

# EIC 3600 COMMERCIAL DATABASE SEARCH REQUEST

7

☐ RUSH - SPE signature required: \_\_\_\_\_

Staff Use Only  
Access DB# 146726

Business Methods Case: 705/ 31, Cross 705/30, Log Number: \_\_\_\_\_

Write in 705 subclass(es) to search required files for 705 cases or cases cross referenced in 705.

Requester's Full Name: Andrew Fischer Examiner #: 75586 Date: March 3, 2005

Art Unit: 3627 Phone Number: 305-0292 Serial Number: 09/558,920

Bldg & Room #: PK5 7B-09 Results Format Preferred: PAPER ☒ DISK ☐ E-MAIL ☐

If more than one search is submitted, please prioritize searches in order of need.

Provide the PALM Bib page or the following:

(Total Pages including this sheet: 2)

Title of Invention: \_\_\_\_\_ Bib Data Sheet Attached \_\_\_\_\_

Inventors (provide full names) : \_\_\_\_\_

Earliest Priority Filing Date: 4/26/00, preferably before 4/26/99

## Requested attachments:

- If possible, provide the cover sheet, the IDS, examples, or relevant citations, authors, etc, if known.
- Please attach copies of the parts of this case that help explain or are most pertinent to this search. Examples are:  
**abstract, background, summary, claim(s) [not all of the claims].**

Abstract, Background of the Invention, and claims included.

## The claimed or apparent novelty of the invention is:

I am looking for an article that describes the IRS's sending out of tax forms to user. I personally receive a 1040 Fast form from the IRS with a preprinted label.

I am looking for something that documents this. An article has the preprinted label and the kind of form sent out to the taxpayer.

This one of those cases where I (personally) have actually received "prior art" from the IRS and I am now trying to document it.

I am also looking for any information that describes features of "Turbo Tax for the Web"

## This search should focus on: (Also include keywords or synonyms)

- 1) A preprinted label or other stored customer info; and sending out a form (e.g. the 1040-EZ) the IRS expects the taxpayer to file.
- 2) Also the ability of a taxpayer to electronically retrieve tax forms (e.g. in PDF form).
- 3) Also the ability of a taxpayer to electronically retrieve **their** tax records.
- 3) Articles that describe features of Turbo Tax for the Web

Additional bonus stuff would include doing this electronically with encryption

considered all apt 8/22/05

If you have any questions or need help with keywords, please feel free to contact me.

Special Instructions or Other Comments

This is a limited search and not a Template Search

Set	Items	Description
S1	63	AU=(REGAN D? OR REGAN, D?)
S2	57343	(TAX OR TAXES) (2N) FORM? ? OR 1040EZ OR 1040()EZ
S3	24318836	LABEL? OR INFORMATION OR INFO
S4	7200	S2(30N) (IRS OR REVENUE()SERVICE? ?)
S5	176981	S3(7N) (PREPRINT? OR PRINT??)
S6	80	S4(S)S5
S7	55	S6 NOT PY>2000
S8	37	RD (unique items)
S9	89	TURBO()TAX(2W)WEB
S10	46	S9 NOT PY>2000
S11	18	RD (unique items)
S12	99	S2(4N)PDF
S13	63	S12(15N) (RETRIEV? OR PRINT? OR ACCESS? OR DOWNLOAD? OR DOW- N())LOAD?)
S14	5892	TAX()RECORD? ?
S15	263	S14(6N) (ONLINE OR ON()LINE OR INTERNET OR NETWORK? ? OR WE- B? OR ELECTRONIC?)
S16	58	S15(10N) (RETRIEV? OR PRINT? OR ACCESS? OR DOWNLOAD? OR DOW- N())LOAD?)
S17	84	(S16 OR S13) NOT PY>2000
S18	41	RD (unique items)
S19	111003	TAX() (RETURN? ? OR DOCUMENT?)
S20	1049	S19(3N) (PAST OR PREVIOUS)
S21	6	S20(10N) (RETRIEV? OR PRINT? OR ACCESS? OR DOWNLOAD? OR DOW- N())LOAD?)
S22	10763	TURBO()TAX OR TURBOTAX
S23	11	S22(S) (S15 OR S20)
S24	1166	S22(10N) (S14 OR S19)
S25	16	S22(S)S14
S26	16	S25 NOT S23
S27	12	RD (unique items)

? show file

File 9:Business & Industry(R) Jul/1994-2005/Mar 08  
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(c) 2005 McGraw-Hill Co. Inc

File 634:San Jose Mercury Jun 1985-2005/Mar 08  
(c) 2005 San Jose Mercury News

File 810:Business Wire 1986-1999/Feb 28  
(c) 1999 Business Wire  
File 813:PR Newswire 1987-1999/Apr 30  
(c) 1999 PR Newswire Association Inc

*Considered ag 7 3/11/05*

8/3,K/1 (Item 1 from file: 9)  
DIALOG(R)File 9:Business & Industry(R)  
(c) 2005 The Gale Group. All rts. reserv.

1820100 Supplier Number: 01820100 (USE FORMAT 7 OR 9 FOR FULLTEXT)  
**Multimedia 97 - Warnock Envisions Mixed-Media World**  
(World Wide Web, CD-ROMs, and digital video will continue a change in  
information handling that began with desktop publishing)  
Newsbytes News Network, p N/A  
May 07, 1997  
DOCUMENT TYPE: Journal ISSN: 0983-1592 (United States)  
LANGUAGE: English RECORD TYPE: Fulltext  
WORD COUNT: 437

ABSTRACT:  
...toward targeting information to smaller and smaller groups, even  
individuals, and "re-purposing" the same **information** for publication in  
different formats, including **print**, online, CD-ROM, and video. Companies  
are increasingly sending out multiple small catalogs, often aiming...  
  
...customers. There is also a move toward publishing information online.  
For example, the US Internal **Revenue Service** used to print millions of  
**tax forms** each year and ship them across the country. Now those forms  
are available on the...

8/3,K/2 (Item 1 from file: 15)  
DIALOG(R)File 15:ABI/Inform(R)  
(c) 2005 ProQuest Info&Learning. All rts. reserv.

01771583 04-22574  
**Web-based tax resources**  
Schmidt, Dennis R; Yancey, William F  
Tax Adviser v30n2 PP: 98-105 Feb 1999  
ISSN: 0039-9957 JRNL CODE: TAD  
WORD COUNT: 3628

...TEXT: instructions are located at <http://www.adobe.com/prodindex/acrobat/readstep.html>. Most PDF **tax forms** can only  
be viewed or **printed**; **information** cannot be entered directly on the  
form before printing. The **IRS**, however, recently added several "fill-in"  
forms to its Website, which allow data to be...

8/3,K/3 (Item 2 from file: 15)  
DIALOG(R)File 15:ABI/Inform(R)  
(c) 2005 ProQuest Info&Learning. All rts. reserv.

01670282 03-21272  
**Capitol corridors: Accountant-client privilege measure will trigger  
continuing education programs**  
Goldstein, Benson  
National Public Accountant v43n5 PP: 5 Jul 1998  
ISSN: 0027-9978 JRNL CODE: NPA  
WORD COUNT: 841

...TEXT: introduced on April 1 (S. 1901) the Taxpayers Internet Assistance  
Act. The legislation requires the **IRS** to release over the Internet **tax  
forms**, publications, regulations and rulings at the same time the agency  
releases the **information** in **print**. The list of items which S. 1901 also

requires the **IRS** to provide over the Internet includes the Internal Revenue Manual, Internal Revenue Bulletins, Revenue Rulings...

**8/3,K/4 (Item 3 from file: 15)**  
DIALOG(R)File 15:ABI/Inform(R)  
(c) 2005 ProQuest Info&Learning. All rts. reserv.

00836429 94-85821  
**IRS hoping for many happy returns with new system**  
Gaffin, Adam  
Network World v11n11 PP: 32 Mar 14, 1994  
ISSN: 0887-7661 JRNL CODE: NWW  
WORD COUNT: 779

...TEXT: ensure reliable scanning of handwritten numerals, which comprise the bulk of information on the typical **tax form**.

She said the **IRS** is considering ways to minimize problems with alphabetic characters, such as those found in addresses. The solutions could include encouraging greater use of **preprinted labels** sent to taxpayers and redesigning **tax forms** to minimize the need for characters.

The imaging project is part of a larger \$7 billion effort to automate the **IRS** called the Tax Systems Modernization project. Robert Dornan, senior vice president at Federal Source, Inc...

**8/3,K/5 (Item 4 from file: 15)**  
DIALOG(R)File 15:ABI/Inform(R)  
(c) 2005 ProQuest Info&Learning. All rts. reserv.

00743513 93-92734  
**First looks0**  
Page, Walter H Jr; Randall, R David  
Massachusetts CPA Review v67n3 PP: 32-34 Summer 1993  
ISSN: 0025-4770 JRNL CODE: MCP  
WORD COUNT: 1935

...TEXT: 5000 Cox Road, Suite 100 Glen Allen, VA 23060 1-800-998-8518

Laser Librarian **Tax Form** Service uses your computer and laser printer to print blank federal and state **tax forms**, federal instructions, state instructions. **IRS** Tax Publications, and **IRS** Code. In a matter of minutes you can produce low-cost **tax forms** and instructions without leaving your desk. The **IRS** publications subject matter index is a research tool to locate tax topics referenced by publication...

...Laser generated mailing labels are predefined for all **IRS** service centers and 99 state agencies. **Labels** and envelopes can be **printed** with or without a return address. Federal forms only are \$145 and a full service ...

**8/3,K/6 (Item 5 from file: 15)**  
DIALOG(R)File 15:ABI/Inform(R)  
(c) 2005 ProQuest Info&Learning. All rts. reserv.

00539545 91-13889  
**Why Apr. 15 Is Getting Worse and Worse**

Saunders, Laura  
Forbes v147n6 PP: 84-87 Mar 18, 1991  
ISSN: 0015-6914 JRNL CODE: FBR

...ABSTRACT: amounts. Defensive maneuvers that taxpayers can take include:  
1. keeping impeccable records, 2. using the **preprinted** address label  
supplied by the IRS when filing a return, 3. not mailing a tax return  
until...

...on the return - any discrepancy between the amount on a 1099 form or W-2  
**form** and the **tax** return, 9. paying attention to the exact way that  
information goes to the **IRS**, and 10. being careful of hidden assets.

**8/3,K/7 (Item 1 from file: 16)**  
DIALOG(R)File 16:Gale Group PROMT(R)  
(c) 2005 The Gale Group. All rts. reserv.

07251652 Supplier Number: 61602677 (USE FORMAT 7 FOR FULLTEXT)  
**Cruising the IRS' Web site really isn't too taxing. (Government Activity)**  
McCARTHY, SHAWN P.  
Government Computer News, v19, n7, p26  
April 3, 2000  
Language: English Record Type: Fulltext  
Document Type: Tabloid; Trade  
Word Count: 1337

... site makes smart use of icons to point visitors to help and search  
tools.

- \* The **IRS** focuses its online ...taxpayers.
- \* The agency controls Web costs by using NTIS' shared government  
service to host the **tax** site.
- \* A **forms** overlay prompts taxpayers to fill in **information** before  
they **print** out PDF forms.
- \* The agency should post updates and agency news to the home page...

**8/3,K/8 (Item 2 from file: 16)**  
DIALOG(R)File 16:Gale Group PROMT(R)  
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06007397 Supplier Number: 53403163 (USE FORMAT 7 FOR FULLTEXT)  
**Prime Financial New Year's Resolutions: Hire a Good Financial Planner,  
Stick to a Good Investment Strategy.**  
PR Newswire, p9442  
Dec 15, 1998  
Language: English Record Type: Fulltext  
Document Type: Newswire; Trade  
Word Count: 732

... VA, firm which manages nearly \$1 billion in client assets. For  
instance, he said, "The **IRS** 'pre-printed labels' will no longer  
contain Social Security numbers, to help protect privacy. But this means  
every taxpayer must now enter their number on the **tax forms** -- and that  
means mistakes will occur, leading to taxpayer problems." Edelman added  
that there are...

**8/3,K/9 (Item 3 from file: 16)**  
DIALOG(R)File 16:Gale Group PROMT(R)

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05797142 Supplier Number: 50288362 (USE FORMAT 7 FOR FULLTEXT)

**\*\*\*\*VeriSign Wins Online Tax Return Contract 09/08/98**

Newsbytes, pN/A

Sept 8, 1998

Language: English Record Type: Fulltext

Article Type: Article

Document Type: Newswire; General Trade

Word Count: 509

... but also must submit paper-based signatures in order to authenticate the electronic return. An IRS spokesman told Newsbytes that taxpayers who have filed a 1040PC, a **form** with their **tax information** that is **printed** out from a home computer, will receive a package for the 1998 tax year that...

**8/3,K/10 (Item 4 from file: 16)**

DIALOG(R)File 16:Gale Group PROMT(R)

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05560662 Supplier Number: 48423835 (USE FORMAT 7 FOR FULLTEXT)

**Spokane and Several Eastern Washington Post Offices Offer Late Collections April 15**

PR Newswire, p0414LATU072

April 14, 1998

Language: English Record Type: Fulltext

Document Type: Newswire; Trade

Word Count: 359

... One ounce is about four pages. IRS will return short postage-paid envelopes.

-- Use an **IRS** **labeled** envelope if you have one. If not, **print** the proper **IRS** address.

-- Print your return address in the upper left-hand corner.

-- Drop off **tax forms** before the last collection box pick-up time to ensure an April 15 postmark. Collection...

**8/3,K/11 (Item 5 from file: 16)**

DIALOG(R)File 16:Gale Group PROMT(R)

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05560507 Supplier Number: 48423680 (USE FORMAT 7 FOR FULLTEXT)

**Many Colorado Post Offices Offer Late Tax Mail Collections April 15; Tax Mail Tips**

PR Newswire, p0414LATU075

April 14, 1998

Language: English Record Type: Fulltext

Document Type: Newswire; Trade

Word Count: 782

... One ounce is about four pages. IRS will return short postage-paid envelopes

-- Use an **IRS** **labeled** envelope if you have one. If not, **print** the proper **IRS** address.

-- Print your return address in the upper left-hand corner.

-- Drop off **tax forms** before the last collection pick-up time to ensure an April 15 postmark. Collection times...

8/3,K/12 (Item 6 from file: 16)  
DIALOG(R)File 16:Gale Group PROMT(R)  
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03530588 Supplier Number: 44950075  
**Imaging system chosen for IRS**  
Government Computer News, p4  
August 29, 1994  
Language: English Record Type: Abstract  
Document Type: Magazine/Journal; Tabloid; Trade

ABSTRACT:  
...tapped Nestor's services to assist Loral in producing an imaging system for the Internal Revenue Service ( IRS ) that will translate handwritten and machine- printed information on paper tax forms to a digital format. Nestor will provide NestorReader, a character recognition software product, for the IRS Document Processing System (DPS). NestorReader will be used with accelerator cards from Alta Technology (Sandy...

8/3,K/13 (Item 1 from file: 148)  
DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

12140886 SUPPLIER NUMBER: 61403897 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Tax Analysts: \$18m a year, but still 'revolutionary'.**  
Fuller, John  
Accounting Today, 13, 21, 10  
Nov 22, 1999  
ISSN: 1044-5714 LANGUAGE: English RECORD TYPE: Fulltext  
WORD COUNT: 862 LINE COUNT: 00072

... free tax news wire, read up on tax history and even check out presidential income tax forms .  
Tax Analaysts also uses its Web site to post IRS documents within 30 minutes of receiving them.  
"We try to give away as much as...

8/3,K/14 (Item 2 from file: 148)  
DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

07535295 SUPPLIER NUMBER: 16241788 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Imaging system chosen for IRS. (Loral Corp enlists help of Nestor Inc)**  
**(News Roundup) (Brief Article)**  
Menke, Susan M.; Masud, Sam; Smith, James M.; Grimm, Vanessa Jo  
Government Computer News, v13, n19, p4(1)  
August 29, 1994  
DOCUMENT TYPE: Brief Article ISSN: 0738-4300 LANGUAGE: ENGLISH  
RECORD TYPE: FULLTEXT  
WORD COUNT: 171 LINE COUNT: 00013

TEXT:  
...Corp. has enlisted Nestor Inc. to help Loral develop an imaging system for the Internal Revenue Service that will convert handwritten and machine- printed information on paper tax forms to a digital



format.

**8/3,K/15 (Item 3 from file: 148)**

DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

06779534 SUPPLIER NUMBER: 14746741 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**IRS: TAX TIME 1994**  
PR Newswire, p1228DC007  
Dec 28, 1993  
LANGUAGE: ENGLISH RECORD TYPE: FULLTEXT  
WORD COUNT: 1152 LINE COUNT: 00106

... and other taxpayers who used a paid preparer last year. The postcard includes a pre-**printed** label and a payment voucher. Taxpayers who want to prepare their own forms may request a...

**8/3,K/16 (Item 1 from file: 275)**

DIALOG(R)File 275:Gale Group Computer DB(TM)  
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02216963 SUPPLIER NUMBER: 21116151 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**\*\*\*VeriSign Wins Online Tax Return Contract.**  
Newsbytes, n93, pNEW09080042  
Sept 8, 1998  
LANGUAGE: English RECORD TYPE: Fulltext  
WORD COUNT: 523 LINE COUNT: 00044

... but also must submit paper-based signatures in order to authenticate the electronic return. An **IRS** spokesman told Newsbytes that taxpayers who have filed a 1040PC, a **form** with their **tax information** that is **printed** out from a home computer, will receive a package for the 1998 tax year that...

**8/3,K/17 (Item 2 from file: 275)**

DIALOG(R)File 275:Gale Group Computer DB(TM)  
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01921524 SUPPLIER NUMBER: 18171465 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Mail. (Letter to the Editor)**  
PC/Computing, v9, n5, p23(4)  
May, 1996  
DOCUMENT TYPE: Letter to the Editor ISSN: 0899-1847 LANGUAGE:  
English RECORD TYPE: Fulltext  
WORD COUNT: 2128 LINE COUNT: 00163

... Online  
Bad Form for Filing  
You mentioned in your March issue that you can download **tax forms** from the Internal **Revenue Service** 's Web site ("Net Cash," page 32). This is true, but not all of them...

...the 1099 form you mentioned. The 1099 and other forms are machine-readable, so copies **printed** from a PC are for **information** purposes only. We all know by now that nothing from the IRS is that easy...

8/3,K/18 (Item 3 from file: 275)

DIALOG(R)File 275:Gale Group Computer DB(TM)  
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01420929 SUPPLIER NUMBER: 09391146 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Horizontal applications. (Supplement to Jan 1991 issue of DG Review)**  
**(directory)**

DG Review, v11, n7, pS7(6)

Jan, 1991

DOCUMENT TYPE: directory ISSN: 1050-9127 LANGUAGE: ENGLISH

RECORD TYPE: FULLTEXT; ABSTRACT

WORD COUNT: 8772 LINE COUNT: 00797

... INC.

Application: Income tax return preparation Product Name: Tax Pax: The  
1040 Package Description: This **tax form** preparation package calculates  
and prints Internal **Revenue Service**, state and city income **tax forms**  
. In addition to predefined forms already supported, other forms (free-form  
text, explanatory letters, supplemental...

...continuous forms, film overlays and user-defined computer-generated  
forms. It has the ability to **print** data organizers and rollover interview  
**information** from year to year. The system is supported by a CPA and was  
written using...

8/3,K/19 (Item 4 from file: 275)

DIALOG(R)File 275:Gale Group Computer DB(TM)  
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01261999 SUPPLIER NUMBER: 07197881 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Applications software. (buyers guide)**

DG Review, v6, n2, p12(11)

Winter, 1988

DOCUMENT TYPE: buyers guide ISSN: 1050-9127 LANGUAGE: ENGLISH

RECORD TYPE: FULLTEXT; ABSTRACT

WORD COUNT: 14755 LINE COUNT: 01350

... INC.

Application: Income tax return preparation Product Name: TAX PAX: The  
1040 Package Description: This **tax form** preparation package calculates  
and prints Internal **Revenue Service**, state and city income **tax forms**  
. In addition to predefined forms already supported, other forms (free-form  
text, explanatory letters, supplemental...

...continuous forms, film overlays and user-defined computer-generated  
forms. It has the ability to **print** data organizers and rollover interview  
**information** from year to year. The system is supported by a CPA and was  
written using...

8/3,K/20 (Item 5 from file: 275)

DIALOG(R)File 275:Gale Group Computer DB(TM)  
(c) 2005 The Gale Group. All rts. reserv.

01117898 SUPPLIER NUMBER: 00608776

**The Tax Advantage.**

Call-A.P.P.L.E., v8, n3, p45

March, 1985

DOCUMENT TYPE: product announcement ISSN: 8755-4909 LANGUAGE:

ENGLISH            RECORD TYPE: ABSTRACT

...ABSTRACT: D, E, G, SE, and W for the 1984 tax returns. It is possible to **print** all **information** directly onto the **IRS** forms with the exception of **form** 1040. **Tax** files from Array's 'The Home Accountant' can be automatically entered in appropriate sections of...

**8/3,K/21            (Item 1 from file: 636)**

DIALOG(R)File 636:Gale Group Newsletter DB(TM)  
(c) 2005 The Gale Group. All rts. reserv.

03847391      Supplier Number: 48365197 (USE FORMAT 7 FOR FULLTEXT)

**RNC: Nicholson to Gore: Scrap the code**

M2 Presswire, pN/A

March 19, 1998

Language: English      Record Type: Fulltext

Document Type: Newswire; Trade

Word Count:    391

...      billion and 5.4 billion hours working to comply with federal taxes each year. The **IRS** sends out approximately 8 billion pages of forms and instructions each year. There are at least 480 different **tax forms**, each with many pages of instructions. The easiest form, the **1040EZ** has 33 pages of instructions alone, and all of it is in fine **print**.

Noting that the White House has recently **labeled** serious tax reform efforts "reckless," Nicholson asked, "It's great to promise that the phones ...

**8/3,K/22            (Item 1 from file: 20)**

DIALOG(R)File 20:Dialog Global Reporter  
(c) 2005 The Dialog Corp. All rts. reserv.

10177054 (USE FORMAT 7 OR 9 FOR FULLTEXT)

**INVESCO Awarded 'BetterWeb(SM)' Seal**

PR NEWSWIRE

March 21, 2000

JOURNAL CODE: WPRW      LANGUAGE: English      RECORD TYPE: FULLTEXT

WORD COUNT:    390

...open mutual fund and IRA accounts, and an online "Tax Center," from which clients can **print tax forms**, access **tax** legislation **information** and link to the **IRS** web site.

**8/3,K/23            (Item 2 from file: 20)**

DIALOG(R)File 20:Dialog Global Reporter  
(c) 2005 The Dialog Corp. All rts. reserv.

04282170 (USE FORMAT 7 OR 9 FOR FULLTEXT)

**Keep Last-Minute Checklist of Details Handy with List of Contacts**

Mark Schwanhausser

KRTBN KNIGHT-RIDDER TRIBUNE BUSINESS NEWS (SAN JOSE (CALIF.) MERCURY NEWS)

February 07, 1999

JOURNAL CODE: KSJM      LANGUAGE: English      RECORD TYPE: FULLTEXT

WORD COUNT:    1315

(USE FORMAT 7 OR 9 FOR FULLTEXT)

-- Jot your Social Security number onto your **tax form** . Starting this year, your SSN is no longer **printed** on the peel-off **labels** . Your SSN probably is on a W-2 or other attachment, but don't make the **IRS** or **FTB** hunt. Include your number on each page of the return in case the...

**8/3,K/24 (Item 3 from file: 20)**  
DIALOG(R)File 20:Dialog Global Reporter  
(c) 2005 The Dialog Corp. All rts. reserv.

04263771 (USE FORMAT 7 OR 9 FOR FULLTEXT)  
**Tax Changes Make Filing For Individuals A Little Less Painful**  
Dave DeWitte  
KRTBN KNIGHT-RIDDER TRIBUNE BUSINESS NEWS (MESSENGER-INQUIRER, OWENSBORO, KY)  
February 07, 1999  
JOURNAL CODE: KMEN LANGUAGE: English RECORD TYPE: FULLTEXT  
WORD COUNT: 883

(USE FORMAT 7 OR 9 FOR FULLTEXT)

... will be electronic returns.  
Paper filers will need to be aware of some changes. The **IRS** no longer places the filer's Social Security number on the **preprinted mailing label** , Krebs said, so taxpayers must be sure to enter that data on their **form** .  
Also, federal **tax** filers will no longer make out their checks to the **IRS** . Instead, the checks should be made out to the U.S. Department of the Treasury...

**8/3,K/25 (Item 4 from file: 20)**  
DIALOG(R)File 20:Dialog Global Reporter  
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04021974 (USE FORMAT 7 OR 9 FOR FULLTEXT)  
**New Government-Run Tax Store at Milpitas, Calif., Mall Offers Information**  
Mark Schwanhausser  
KRTBN KNIGHT-RIDDER TRIBUNE BUSINESS NEWS (SAN JOSE (CALIF.) MERCURY NEWS)  
January 15, 1999  
JOURNAL CODE: KSJM LANGUAGE: English RECORD TYPE: FULLTEXT  
WORD COUNT: 511

(USE FORMAT 7 OR 9 FOR FULLTEXT)

... plug a parking meter. They can pick up tax forms, get help completing tax returns, **print** out online **information** at the ATM-like kiosks hooked to the Web by high-speed T-1 lines...

**8/3,K/26 (Item 5 from file: 20)**  
DIALOG(R)File 20:Dialog Global Reporter  
(c) 2005 The Dialog Corp. All rts. reserv.

01378366 (USE FORMAT 7 OR 9 FOR FULLTEXT)  
**Cheyenne and Several Wyoming POs Offer Till Midnight Tax Mail Drop-Offs**  
**April 15**  
PR NEWSWIRE  
April 14, 1998 16:3  
JOURNAL CODE: WPRW LANGUAGE: English RECORD TYPE: FULLTEXT

WORD COUNT: 288

(USE FORMAT 7 OR 9 FOR FULLTEXT)

... One ounce is about four pages. IRS will return short postage-paid envelopes.

-- Use an **IRS** **labeled** envelope if you have one. If not, **print** the proper **IRS** address.

-- Print your return address in the upper left-hand corner.

-- Drop off **tax forms** before the last collection box pick-up time to ensure an April 15 postmark. Collection...

**8/3,K/27 (Item 1 from file: 634)**

DIALOG(R)File 634:San Jose Mercury

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10038211

**TAX TIPSHEET**

San Jose Mercury News (SJ) - Sunday, February 7, 1999

By: MARK SCHWANHAUSSER, Mercury News Staff Writer

Edition: Morning Final Section: Business Page: 2E

Word Count: 869

(box) Jot your Social Security number onto your **tax form**. Starting this year, your SSN is no longer **printed** on the peel-off **labels**. Your SSN probably is on a W-2 or other attachment, but don't make the **IRS** or FTB hunt. Include your number on each page of the return in case the...

**8/3,K/28 (Item 2 from file: 634)**

DIALOG(R)File 634:San Jose Mercury

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10015008

**GREAT MALL OUTLET IRS, FTB TO SERVE SHOPPERS**

San Jose Mercury News (SJ) - Friday, January 15, 1999

By: MARK SCHWANHAUSSER, Mercury News Staff Writer

Edition: Morning Final Section: Business Page: 1C

Word Count: 520

...Taxpayers will be able to do almost all the things they can do at the **IRS** and FTB offices in downtown San Jose, but without having to plug a parking meter. They can pick up **tax forms**, get help completing tax returns, **print** out online **information** at the ATM-like kiosks hooked to the Web by high-speed T-1 lines...

**8/3,K/29 (Item 3 from file: 634)**

DIALOG(R)File 634:San Jose Mercury

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06864060

**FEDERAL TAX PACKAGES SOON TO BE EN ROUTE**

San Jose Mercury News (SJ) - Tuesday, December 29, 1992

By: Associated Press

Edition: Morning Final Section: Business Page: 7D

Word Count: 290

... employed taxpayers who used a paid preparer last year. The post card

includes a pre- printed label and tells taxpayers to take the card to their preparer, who will have the necessary tax forms .

The IRS said it expects returns from 60.5 million taxpayers using Form 1040, 18.5 million using Form 1040A and 16.8 million using Form 1040EZ . In addition to the 14 million people expected to file electronically, 6.7 million are...

8/3,K/30 (Item 4 from file: 634)  
DIALOG(R)File 634:San Jose Mercury  
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05861085

**IRS GETS IN HOLIDAY SPIRIT, DELAYS TAX FORMS**

SAN JOSE MERCURY NEWS (SJ) - Wednesday December 26, 1990

By: ROBERT A. RANKIN, Mercury News Washington Bureau

Edition: Morning Final Section: Business Page: 1F

Word Count: 586

... help ensure that refunds come without undue delay, Altman said, is to use the pre- printed address labels IRS includes in its tax - form packages. Those labels help avoid mistakes made when taxpayer-identification information is entered manually, which slows processing, Altman said.

IRS will mail about 97 million tax packages to taxpayers. An additional 11 million taxpayers -- those who filed farm or business schedules last year using tax forms provided by commercial tax preparers -- will get only a postcard with a label, Altman said...

8/3,K/31 (Item 1 from file: 813)  
DIALOG(R)File 813:PR Newswire  
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1454071

LATU059

**Many Colorado Post Office Locations Offering Late Tax Mail Collections on April 15**

DATE: April 13, 1999 12:58 EDT WORD COUNT: 789

... first ounce and 22 cents for each additional ounce. One ounce is about four pages. IRS will return short postage-paid envelopes.

- For information on filling out your tax forms , customers can call the IRS 24-hour toll free help line at 1-800-829-1040; or the IRS web site at [www.irs.ustreas.gov](http://www.irs.ustreas.gov).

- Use an IRS labeled envelope if you have one. If not, print the proper IRS address.

- Print your return address in the upper left-hand corner.

- Drop off tax forms before the last collection pick-up time to ensure an April 15 postmark. Collection times...

8/3,K/32 (Item 2 from file: 813)  
DIALOG(R)File 813:PR Newswire

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1454058 LATU060  
**Several Idaho Post Offices to Offer Late Tax Mail Collections April 15;  
Boise PO to Have BSU Band**

DATE: April 13, 1999 12:47 EDT WORD COUNT: 401

...ounce is about four pages. The IRS will return short  
postage-paid envelopes.

-- Use an **IRS** **labeled** envelope if you have one. If not, **print**  
the proper **IRS** address.

-- Print your return address in the upper left-hand corner.

-- Drop off **tax forms** before the last collection pick-up time to  
ensure an April 15 postmark. Collection times are posted on boxes.

**IRS** information:

-- For help in filling out your return, call the **IRS** 's 24-hour toll  
free help line at 1-800-829-1040 or access the...

8/3,K/33 (Item 3 from file: 813)  
DIALOG(R)File 813:PR Newswire  
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1257964 LATU074  
**Several Idaho Post Offices to Offer Late Tax Mail Collections April 15;  
Boise to Have Philharmonic**

DATE: April 14, 1998 15:02 EDT WORD COUNT: 353

... ounce is about four pages. The IRS will return short postage-paid  
envelopes.

-- Use an **IRS** **labeled** envelope if you have one. If not, **print**  
the proper **IRS** address.

-- Print your return address in the upper left-hand corner.

-- Drop off **tax forms** before the last collection pick-up time to  
ensure an April 15 postmark. Collection times...

8/3,K/34 (Item 4 from file: 813)  
DIALOG(R)File 813:PR Newswire  
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1038598 DCTH009  
**Tax Forms Are in the Mail**

DATE: January 2, 1997 13:35 EST WORD COUNT: 3,169

... taxpayers who used a paid preparer last year. This postcard program has  
included a pre- **printed label** for use on the tax return and a reply card

for taxpayers who wanted forms...

... The postcard program was started to save printing and distribution costs, since preparers seldom used **IRS** -printed forms. But since preparers also seldom used the labels, the program was eliminated.

The **IRS** is sending a payment voucher, Form 1040-V, with all **Form 1040 tax** packages. Taxpayers with a balance due should mail the vouchers with their payments. The vouchers allow the **IRS** to process payments more efficiently and accurately.

The printing bill for the total mailout is...

**8/3,K/35 (Item 5 from file: 813)**  
DIALOG(R)File 813:PR Newswire  
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0903019 DCW045  
**IRS ANNOUNCES A NEW HOME PAGE**

DATE: January 17, 1996 17:10 EST WORD COUNT: 1,026

...including a hypertext version of Publication 17 (Your Federal Income Tax), tax statistics, and the **IRS** Newsstand, where users can find a complete menu of **IRS** news releases and fact sheets.

Internal Revenue Electronic Information Services Q & A

**IRS tax forms** , instructions and publications are available on-line to meet the needs of individuals, businesses, and other organizations. Taxpayers can download and **print information** , publications and any of over 600 **tax forms** and instructions.

Q-1 What **IRS** electronic services are available?

A Taxpayers and practitioners will find many tax research tools available...

**8/3,K/36 (Item 6 from file: 813)**  
DIALOG(R)File 813:PR Newswire  
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0774642 DC007  
**IRS FACT SHEET: TAX TIME 1995**

DATE: December 30, 1994 12:22 EST WORD COUNT: 1,846

...Filing	13.5 m	15.5 m
TeleFile	0.5 m	0.7 m
Form <b>1040EZ</b>	17.2 m	17.2 m
Form 1040A	18.9 m	18.2 m
Form 1040	60.3 m	59.3 m



The **IRS** will again mail about 23 million postcards to farmers, fishers, self-employed persons and other taxpayers who used a paid preparer last year. The postcard includes a pre-**printed label** for use on the tax return. Taxpayers who want to prepare their own forms may...

8/3,K/37 (Item 7 from file: 813)  
DIALOG(R)File 813:PR Newswire  
(c) 1999 PR Newswire Association Inc. All rts. reserv.

0769724 CH016  
**IRS OFFERS YEAR-END TAX TIPS**

DATE: December 9, 1994 15:18 EST WORD COUNT: 743

...is running out for  
both holiday shopping and for 1994 tax planning!

According to the **IRS**, the new **tax form** packages have not gone out yet, but some Tennesseans have already gotten a tax "present..."

...used a paid tax preparer in 1994, you may have  
gotten a postcard from the **IRS**.

The card allows you to take only a **preprinted label** to your preparer, since you may no

11/7/1 (Item 1 from file: 9)  
DIALOG(R)File 9:Business & Industry(R)  
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2703039 Supplier Number: 02703039

**Intuit May Find Web Taxing**

(Intuit is offering an online version of its Turbo Tax application and has signed up 350 sponsors to promote the offering)

Interactive Week, v 7, n 3, p 68  
January 24, 2000

**ABSTRACT:**

Intuit has introduced **Turbo Tax** for the **Web**, an online version of its Turbo Tax software. The new offering is part of the company's push into the online industry and Intuit will have some 350 sponsors, including America Online, Bank of America and Well Fargo, promote the offering. The company's best known software, Quicken, accounts for only around 15% of the firm's revenue. The federal government has made decisions that will help tax software manufacturers such as Intuit. The Internal Revenue Service want 80% of the population to return their taxes electronically by 2007. The need for electronic filers to mail in a signature has been eliminated. Plans are being made to give electronic and phone filers a tax credit. Forrester Research predicts that around 1 mil people in the US will prepare taxes online in 2000 vs 250,000 in 1999.

Intuit will charge consumers \$9.95 to prepare a federal return with **Turbo Tax** for the **Web**. The desktop version of the application had unit sales of 4.2 mil in 1999 and it frequently cost about \$10 after rebates.

HD Vest Technology Services is offering a free tax preparation application, but is counting on tax payers bringing in partially finished tax returns to one of its 8,000 tax professionals. The company has an ad budget of around \$5 mil and a public relations budget of around \$3 mil.

11/7/2 (Item 1 from file: 16)  
DIALOG(R)File 16:Gale Group PROMT(R)  
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07438017 Supplier Number: 62521604 (THIS IS THE FULLTEXT)

**Online Tax Prep Gets Cheap. (Company Business and Marketing)**

Alexander, Antoinette

Accounting Technology, v16, n4, p26

May, 2000

**TEXT:**

Popularity of online tax prep goes up--prices go down.

What does a movie rental, an ice cream cone, and online tax preparation have in common? Each costs less than \$10.

These days more and more companies are offering online tax preparation, triggering a price war that is driving some companies to slash prices, or maybe charge nothing at all to prepare and file returns on the Web. And while consumers may be smiling over the extra cash in their pocket, professional preparers may be wondering what impact this will have on their future.

And if there is a threat, where is it coming from? Web-based tax preparation for a song or from the financial planning community--H.D. Vest's home page urges taxpayers to use its professional preparers for free. Is this the wave of the future?

"I think it (free or low-cost tax preparation) will become more common because the whole notion of tax return preparation will become a commodity," says Dan Youse, vice president and publisher of Financial

Advisory Services (FAS) for Fort Worth, Texas-based Practitioners Publishing Co. "The money to be made is not in tax preparation, but is in providing a valuable service to the client."

Vendors clearly see opportunity in Web-based tax preparation and electronic filing. Last year, Intuit paid \$52 million to buy SecureTax, the online preparation service owned by Universal Tax Systems of Rome, Ga. That was a big paycheck for a business that processed about 280,000 returns in the 1999 tax season. The purchase also helped expand Intuit's capacity to 2.5 million Web-based returns for this season, up from roughly 250,000 last year.

The consumer tax market, including Web-based preparation, has experienced 30 to 40 percent growth in each of the last two years, and the trend is expected to continue as taxpayers increasingly turn from pen-and-paper preparation to technology.

But do low-cost Internet consumer programs hurt professionals? Larry Zuckerman, vice president of Hauppauge, N.Y.-based Micro Vision and a practitioner, says professionals can be harmed if they don't position themselves correctly.

"If they are providing a true value-added service as a tax adviser, then the answer is no (they are not in danger)," says Zuckerman. "If they are positioning themselves as a preparer of forms, then my answer is yes."

Intuit itself says the loss of professional business to TurboTax, its disk-based consumer package, is minor. But however professionals position themselves, there's no doubt that Internet-based tax preparation and filing services will continue to proliferate and that they will need to keep an eye on developments in the consumer market.

Besides the wallet-pleasing prices, Web-based tax prep services have many similarities. For example, each stresses the security and confidentiality of consumer data and most are targeting filers referred to as the "do-it-yourselfers," those that usually prepare their own taxes with paper and pencil. And many Web tax programs provide users with an easy-to-use questionnaire that walks them through the process.

One example of these online bargains is H&R Block's online tax program, based on Block's TaxCut software. In January, the company launched an expanded version of its site, [www.hrblock.com](http://www.hrblock.com), enabling do-it-yourself filers to prepare returns online for \$9.95 for a federal return and e-filing. State returns are free of charge this year, but could cost users next season, says Aaron Horvath, the interactive marketing manager. Horvath would not disclose the exact number of users, but he did say "the demand for online tax prep is in line with our expectations."

The site also includes tax advice, helpful tools, frequently updated tax information, and refund options such as Electronic Refund Advance (ERA) and Refund Rewards. An ERA allows users to receive a tax refund advance of up to \$5,000 to be deposited directly into their bank accounts. Refund Rewards lets users receive their refunds loaded on a prepaid buying card that can be used for ATM withdrawals or to make purchases anywhere MasterCard is accepted. When customers use the card with a Refund Rewards partner, they will receive special discounts on travel, vacations, automobiles, and other purchases.

Intuit, developer of Quicken TurboTax for the Web, appears to have been sucked into the consumer Web site war and cut its prices. Last year the Mountain View, Calif.-based company offered online filing for \$19.95 per return. This year it cost \$9.95 each for federal and state returns. The company also renamed the program, which was called WebTurboTax last year. Elizabeth Dougherty, product manager for the online program, says that as of February 13, 405,000 federal returns had been completed, compared to last year's total of 240,000.

Like most online tax programs, the site, found at [www.turbotax.com](http://www.turbotax.com), targets the do-it-yourself filers. "What we are seeing is great consumer acceptance of online tax prep," says Dougherty. "People who filed returns with paper and pencil are finding alternatives."

And the market continues to change as Torrance, Calif.-based CCH rolled out its online tax prep program at [www.completetax.com](http://www.completetax.com), which went live in January. The site, which can prepare simple to complex returns, targets small business owners and consumers and costs \$7.50 for one federal, one state, and e-filing. Users are not charged for preparing their return until they send their data to CCH's server.

Marty Bush, publisher of the small office/home office (SOHO) group at CCH, would not say how many filers have used the online program, but adds, "we are tracking close to what we are hoping to get." Although CCH is not heavily marketing the program this first year, Bush continues that, "This is the first step for us where we can learn what we need to do and better the product."

CompleteTax does not move the preparation process completely online, although it does provide filing via the Internet. Users must download the organizer to their own personal computers.

The site is part of CCH's ongoing effort to help small businesses grow, and can also be accessed via the company's small business site at [www.toolkit.cch.com](http://www.toolkit.cch.com). The Toolkit site was launched about four years ago to serve as a resource for small businesses adopting technology and the Internet.

Another vendor stepping up to the frontline is Randolph, N.J.-based TaxSimple, which rolled out its site, [etaxsimple.com](http://etaxsimple.com), in January. Users can prepare simple to complex returns for \$9.95 for individual federal, state, and city (for corporate federal, state, and city, it is \$29.95). Up until late March, filers could prepare their returns online and print out a copy, but they could not electronically file. Since its launch, the site, which targets do-it-yourself filers, has attracted more than 1,000 filers, says president John Vora.

Although some of the companies are tight-lipped about the number of customers using their services, it is clear that the appeal of these services varies widely. Intuit says users of Quicken **Turbo - Tax** for the **Web** tend to be women under the age of 35 with annual household incomes less than \$50,000, while CCH's efforts with CompleteTax are aimed squarely at businesses. Meanwhile H.D. Vest is snaring a more affluent, male audience via its Web site.

H.D. Vest's president Roger Ochs says that with his company's VestOnline more than 25 percent of the users earn more than \$50,000 a year and more than half are men.

#### The Planning Link

The link between tax preparation and financial planning is one of the more intriguing developments for professionals.

"We've always believed the tax return is a road map to a financial plan," says Ochs. "We are just now packaging that with the use of our Web site. The tax service and financial planning are like a glove and hand."

Vest married financial planning and tax preparation on its Web site at [www.hdvest.com](http://www.hdvest.com) in January. The Irving, Texas-based company hopes to attract do-it-yourself filers to their financial services by allowing consumers to prepare and e-file their returns for free.

How it works: as consumers prepare their returns, the program will notify them of post year-end tax planning opportunities. If the consumer elects, the system will provide a referral to a nearby H.D. Vest representative, who will help the consumer evaluate investment and financial planning alternatives.

As of mid-March, more than 250,000 users completed or were in the process of completing returns online, says Ochs. The goal is to process more than one million returns online by the end of tax season. Micro Vision sees a clear link between the two services. Zuckerman says that 90 percent of the data needed for financial planning is in a tax return. But the company is linking tax preparation to its financial planning software--not giving one service away.

So far, Vest is the only financial planning company using free tax

preparation as an enticement. Although PPC's Youse sees professional tax preparation as threatened, PPC is not moving in that direction. Nor is Dallas-based 1st Global.

Tony Batman, 1st Global founder and chief executive, says that integrating financial planning with tax "makes sense," and he adds that "Tax professionals, CPAs, and tax attorneys are very gifted at investment matters and helping clients attain their objective." However, Batman says that 1st Global, a financial services company that offers CPAs turnkey solutions to become investment and financial advisors, has no plans of moving in a similar direction.

"If one's objective is to help accounting professionals build a financial planning service, it is ambiguous why one would provide a site that might compete with its constituents," he says. "It is undeniable that consumers who do their own tax prep over the Web will do their own investing."

#### Future of preparers

With the Internet, tax preparation can now be faster, easier, and cheaper. Does that mean the days of needing a professional preparer will soon be over? The consensus is no.

"I think preparers who rely on simple returns are going to find there's a lot of competition from computer-based programs and Internet-based programs," says Bill White of Quick-Tax.com. "For those preparers who do more complicated returns there will still be work. I think the impact will be on the storefront programs more than the professional preparer."

Bush of CCH agrees by saying, "There's a segment of the market that are generally going to do returns themselves whether it is paper and pencil, off-the-shelf (tax programs), or Web-based programs. I think those with complex returns or those that don't have the comfort level will turn to professional preparers."

MicroVision's Zuckerman says, "It depends on how you position yourself. That is why we've been telling people they have to get into other value-added services (such as financial planning). There are ways you can and must distinguish yourself."

Youse also issues a word of warning to CPAs leery of expanding beyond traditional services. "I think it is writing on the wall to our professionals," he says. "They have to wake up." He adds, "If we are going to have CPAs for another ten years, they can't be doing what they've done for the past 20 years."

Antoinette Alexander is a staff writer for Accounting Technology

#### Use of Paid Preparers Rises

Total Returns (thousands)	115,943	118,218	120,351	122,422
Paid Preparer (thousands)	57,415	58,955	60,858	63,480
Percent by Paid Preparer	49.5	49.9	50.5	51.9

The percentage of tax returns prepared by paid professionals rose steadily from 1994 to 1997, the last year for which data is available.

Source: CCH

#### CPA Hits the Web with Consumer Tax Prep

There's just something about the Internet that lured Bill White to establish a Web-based consumer tax preparation site. Of course, the chance to make money in what he sees as a huge developing market played a role.

But for White, a sole practitioner based in St. Joseph, Mo., "A bigger attraction is the excitement of the Web business."

That excitement led him to establish QuickTax.com, a site for preparing and filing Forms 1040EZ and 1040, along with Schedule 1 and Schedule EIC. The site at [www.quick-tax.com](http://www.quick-tax.com) has attracted several hundred users since its launch on March 10. None of the users were previous clients.

Operated by White's company OnLine Taxes, the Quick-Tax service offers online preparation and filing for \$14.95 for a federal return. If a

customer submits the e-mail addresses of two Mends via the Web site, the price drops to \$9.95 per return. State returns are not available.

White says most customers have probably never been clients of a CPA firm. Some have indicated they have used store-front preparers while others are strictly do-it-yourselfers. He sees no threat to his traditional tax preparation business.

"Our traditional business is here because they want the talent of a skilled tax preparer. They want to remove some of the chaos from their lives and sleep better without the additional concern of taxes," he says. White may try to sell other services via the Internet, but does not envision cross-selling professional services to consumer's tax customers.

"There are other Web-based products in the thinking stage," he says. "But they would be used by businesses rather than the online tax preparation user."

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11/7/3 (Item 2 from file: 16)

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07169949 Supplier Number: 61295062 (THIS IS THE FULLTEXT)

**Salomon Smith Barney is the First Full-Service Brokerage Firm to Offer Clients Quicken Turbo Tax for the Web .**

Business Wire, p1504

April 5, 2000

TEXT:

Business Editors/Tax Reporters/Multimedia Writers

NEW YORK--(BUSINESS WIRE)--April 5, 2000

Salomon Smith Barney today announced that it is the first full-service brokerage firm to offer its clients the ability to prepare and file their 1999 taxes online. The service is available at no charge to clients.

In partnership with Intuit, Salomon Smith Barney enables individual investors to import their Salomon Smith Barney Form 1099 online through Quicken(R) Turbo Tax(R) for the WebSM for the 1999 tax season. Gains and losses on securities sold in 1999 are also provided to clients through the import process. State and Federal tax return forms are then automatically updated with this information. Salomon Smith Barney clients are provided this service free of charge as part of their access to account information and services over the Internet.

TurboTax(R) for the WebSM will guide Salomon Smith Barney clients through step-by-step instructions and then automatically fill out their tax forms for them. It also double-checks clients' return to find missing information, overlooked deductions and entries that could trigger audits, and then files clients' return electronically or prints ready-to-file forms.

"At Salomon Smith Barney, we are committed to providing our Financial Consultants and their clients with the best possible technology tools and information available," said Stephen Clifford, Director of the Interactive Marketing Group. "Turbo Tax(R) for the WebSM assists Salomon Smith Barney clients by providing a faster, more efficient method to prepare their taxes."

Turbo Tax(R) for the WebSM is available to clients using Salomon Smith Barney Access, the firm's Internet service. Clients must have completed the activation process for Salomon Smith Barney Access in order to take advantage of the imports. Currently, over 700,000 accounts have on-line account access. The link to Turbo Tax is secured with state-of-the-art, industry-standard SSL (Secure Socket Layers) protocol to shield information during transmission. TurboTax for the Web only supports

browsers that use SSL encryption.

For more information about Turbo Tax(R) for the WebSM, please visit our website at [www.salomonsmithbarney.com](http://www.salomonsmithbarney.com) or call the Turbo Tax help desk at 1-900-555-8899. A "help" section is also available online free of charge at the Turbo Tax(R) for the WebSM site.

Salomon Smith Barney is a global, full-service investment banking and securities brokerage firm. The firm's 11,400 Financial Consultants located in approximately 476 offices across the United States, service over 6.6 million client accounts, representing over \$950 billion in client assets. Salomon Smith Barney is a subsidiary of Citigroup.

Citigroup (NYSE:C), the most global financial services company, provides some 100 million consumers, corporations, governments and institutions in 100 countries with a broad range of financial products and services, including consumer banking and credit, corporate and investment banking, insurance, securities brokerage and asset management. The 1998 merger of Citicorp and Travelers Group brought together such brand names as Citibank, Travelers, Salomon Smith Barney, Commercial Credit (now named CitiFinancial), and Primerica under Citigroup's trademark red umbrella. Additional information may be found at: [www.Citigroup.com](http://www.Citigroup.com).

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07120438 Supplier Number: 60059800 (THIS IS THE FULLTEXT)

**Banks Offer Tax Preparation Via the Web. (use Intuit's Quicken TurboTax tax preparation software) (Product Information)**

Bank Systems + Technology, v37, n3, p26

March, 2000

TEXT:

This year, a lot of banks are looking to catch a bigger break at tax time -- with customers, that is.

More than 350 financial institutions have tapped Intuit, Mountain View, Calif., to supply its popular Quicken TurboTax income-tax preparation software via their Web sites -- where customers also are likely to stumble across other bank products and services.

The number of institutions signing up to offer the software, Quicken TurboTax for the Web, is 10 times more than last year's total, Intuit reported. In 1999, about 240,000 federal and state tax returns were filed using TurboTax for the Web, which works online and doesn't require users to download the application. Overall, 4.4 million taxpayers used Turbo Tax, including the Internet and desktop versions.

Banks of all sizes have agreed to offer **Turbo Tax** through their **Web** sites, including ABN AMRO, Bank of America, Chase Manhattan, Comerica, KeyCorp, Fleet Boston, Wachovia, Wells Fargo, Union Planters, First Union, Crestar, First Tennessee, Hibernia, Mellon, Old Kent Financial, Webster Bank, Santa Barbara Bank & Trust, Southwest Bank of Texas, Associated Banc-Corp, Union Bank of California, Charter One, BB&T, Huntington National, AmSouth, Summit Bank and Michigan National. A number of cyberbanks, credit unions and e-banking vendors also are offering TurboTax for the Web.

Given that federal and state governments have touted speedy tax refunds for electronic filers this year, the service stands to boost banks' Web site traffic as well as wean new online users, industry executives said.

"These (bank) sponsors will help make TurboTax for the Web accessible to millions of taxpayers, including those trying tax preparation software for the first time," reported Bob Meighan, vice president of Intuit's

Consumer Tax Group.

Internet tax filing, too, represents another relationship-building tool that banks can leverage for customer acquisition and retention, bankers said.

"Now, not only can our customers bank, pay bills and apply for loans online, they can complete another basic function: preparing their taxes online," according to Hilary Blackburn, e-commerce director at \$36 billion Summit Bank, Princeton, N.J.

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07084554 Supplier Number: 59707807 (THIS IS THE FULLTEXT)

**U.S. Global Investors Announces Access to Free Online Tax Preparation and Electronic Filing for Eligible Taxpayers.**

Business Wire, p0445

March 2, 2000

TEXT:

Business Editors

SAN ANTONIO--(BUSINESS WIRE)--March 2, 2000

U.S. Global Investors teams with Intuit to provide free Web-based tax preparation and filing to lower income taxpayers, as well as those taxpayers eligible to file Form 1040EZ

U.S. Global Investors Inc. (Nasdaq:GROW), a registered investment advisory firm with \$1.5 billion in assets under management, announced today that it is also participating in the Quicken Tax Freedom Project, a public service initiative that makes online tax preparation and electronic filing available at no charge to taxpayers with an annual adjusted gross income of \$20,000 or less, as well as anyone filing a Form 1040EZ. This free program applies to both state and federal individual income tax returns.

U.S. Global Investors is offering access to online tax preparation and electronic filing -- at no charge to eligible families and individuals -- in conjunction with Intuit Inc. (Nasdaq:INTU), the maker of personal finance software such as Quicken(R) and Quicken TurboTax(R). U.S. Global Investors will make Intuit's Quicken(R) TurboTax(R) for the Web(sm) and TurboTaxEZ(sm) personal tax preparation Web-based products, which enable taxpayers to securely and quickly prepare and electronically file their tax returns via the Internet, accessible from U.S. Global Investors' Web site at [www.usfunds.com](http://www.usfunds.com) through Oct. 16, 2000.

Frank Holmes, Chairman and CEO, said, "The alliance with Quicken(R) works well with U.S. Global's e-commerce strategy. We're taking advantage of technology to make it easy for shareholders to use our funds to pay their taxes and their bills." Holmes added, "I hope many people take advantage of this service and this technology. It is such a time-saver."

According to IRS statistics, approximately 45 percent of all individual taxpayers are eligible to participate in the Quicken Tax Freedom Project. Last year, more than 86,000 eligible tax filers took advantage of this no-cost Internet-based program, which offers both federal and state income tax preparation and filing. In addition, about a quarter of a million taxpayers used Quicken Turbo Tax for the Web to prepare and file their taxes via the Web.

U.S. Global Investors is also providing Intuit's Quicken TurboTax for the Web to all taxpayers who don't qualify for the free program through its Web site at [www.usfunds.com](http://www.usfunds.com). Taxpayers can go to U.S. Global Investors' site to prepare and file their individual personal federal tax return for \$9.95, and state returns can also be prepared and filed for any state requiring an income tax for \$9.95. Both prices include electronic filing.



U.S. Global Investors Inc.

U.S. Global Investors Inc. is a registered investment adviser with a focus on profitable niche markets around the world. Headquartered in San Antonio, Texas, the company offers financial solutions and provides transfer agency and other services to U.S. Global Investors Funds and U.S. Global Accolade Funds. The groups consist of 14 no-load mutual funds that invest in a wide variety of investment options, from emerging markets to money markets. U.S. Global Investors Inc. has approximately \$1.5 billion under management.

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07067087 Supplier Number: 59581200 (THIS IS THE FULLTEXT)

**Media Metrix Releases the Top 50 At-Home and At-Work Digital Media and Web Audience Ratings in the U.S. for January 2000.**

Business Wire, p1125

Feb 22, 2000

TEXT:

;;;Business Editors

;;;NEW YORK--(BUSINESS WIRE)--Feb. 22, 2000

Media Metrix Adds Two New Measures to Syndicated Monthly Reports to Provide Even Greater Insight Into Internet Usage

Tax Time Drives Visitors to Tax-Related Sites

Americans Spent 57.5 Billion Minutes Online in January

;;;Media Metrix (NASDAQ: MMXI), the leader and pioneer in Internet and Digital Media measurement worldwide, today released the Top 50 At-Home and At-Work combined Digital Media and Web audience ratings in the United States for January 2000. Media Metrix launches two new measures in this month's U.S. Digital Media Report to provide clients with an even deeper and more complete understanding of the digital landscape: average daily unique visitors and total usage minutes. Total usage minutes represent the total amount of connect time or viewing time to the site or entity per month.

;;; "These new measures further our commitment to provide clients with the most comprehensive insight about audiences on the Web," said Mary Ann Packo, president, Media Metrix. "The addition of these measures to our monthly syndicated reports will help online advertisers and marketers make smarter and more strategic business decisions."

;;;Top line findings from Media Metrix' January 2000 Digital Media Report include:

- Americans spent 57.5 billion minutes online in January.

- Overall, 73 million people used the Digital Media in January

- Each person spent an average of 790 minutes or 13.2 hours online during the month.

- America Online, with the most overall online time, had 21.6 billion minutes

of user interaction or 38% of the total user minutes online in January.

- Microsoft was the second largest with 4.2 billion minutes, accounting for 7%

of all time online.

Tax Time Drives Visitors to Personal Finance & Related Sites

;;;At the top of the list of gainers were Money Central, IRS Sites, Quicken Sites, Turbo Tax and others facilitating tax advice and services.

#### TRENDED GROWTH OF TAX-RELATED SITES

Based on total monthly Unique Visitors (000)

September 1999 through January 2000

	Sep-99	Oct-99	Nov-99	Dec-99	Jan-00
Quicken.com sites	2,341	2,514	2,498	2,614	3,926
Money Central	2,751	2,789	2,880	2,794	3,921
Irs.gov	330	701	540	826	2,627
Fedworld.gov	758	788	880	1,019	2,600
Ustreas.gov	1,020	889	884	1,011	2,190
<b>Turbo Tax Web</b>					
site	162	129	159	424	1,412

Media Metrix - Top 50 Digital Media/Web Properties in the U.S.

January 2000 Measurement Period

(1/1/00 through 1/31/00)

Combined At Home and At Work

Rank	Digital Media/Web Properties	Unique Visitors (000)
	Total Universe	72,722
1	AOL Network - Proprietary & WWW	56,457
2	Yahoo Sites	44,258
3	Microsoft Sites	42,673
4	Lycos	31,404
5	Excite@Home	25,439
6	Go Network	22,666
7	NBC Internet	16,700
8	Amazon	15,480
9	AltaVista Sites	13,439
10	About.com Sites	13,160
11	Time Warner Online	12,996
12	Go2Net Network	12,584
13	Real.com Network	12,351
14	eBay	11,587
15	ZDNet Sites	10,684
16	LookSmart	10,293
17	CNET	9,458
18	Weather Channel, The	8,921
19	JUNO / JUNO.COM	8,387
20	Infospace Impressions	7,633
21	GOTO.COM	6,899
22	Viacom Online	6,865
23	AT&T Web Sites	6,855
24	BARNESANDNOBLE.COM	6,477
25	Ask Jeeves	6,352
26	IWON.COM	6,330
27	CitySearch-TicketMaster Online	6,129
28	iVillage.com: (The Womens Network)	5,976
29	Snowball	5,906
30	Fortunecity Global Community	5,861

31	earthlink.net	5,390
32	freelotto.com	5,276
33	smartbotpro.net	5,199
34	bonzi.com	5,100
35	News Corp. Online	5,005
36	MarketWatch.com Sites	4,928
37	Theglobe.com Network	4,862
38	Sony Online	4,853
39	Uproar Network, The	4,765
40	travelocity.com	4,719
41	CDNow, Inc.	4,642
42	directhit.com	4,451
43	mypoints.com	4,441
44	Sportsline.com Sites	4,390
45	Women.com Networks, The	4,310
46	MindSpring	4,293
47	Shockwave	4,200
48	lifeminders.com	4,179
49	mapquest.com	4,154
50	Discovery Network	4,085

Media Metrix - Top 50 Web Sites In The U.S.  
January 2000 Measurement Period  
(1/1/00 through 1/31/00)

Rank	Combined At Home and At Work Web Sites	Unique Visitors (000)
	Total Universe	68,325
1	yahoo.com	43,338
2	msn.com	34,170
3	aol.com	31,376
4	microsoft.com	26,025
5	netscape.com	22,845
6	go.com	20,334
7	lycos.com	17,926
8	passport.com	16,636
9	hotmail.com	16,410
10	amazon.com	14,703
11	excite	14,060
12	bluemountainarts.com	13,014
13	altavista search services	12,697
14	tripod.com	11,727
15	ebay.com	11,547
16	real.com	11,514
17	angelfire.com	10,800
18	snap.com search & services	10,719
19	znet	10,467
20	about.com	9,913
21	weather.com	8,921
22	looksmart.com	8,920
23	xoom.com	8,337
24	cnet.com	8,233
25	msnbc.com	8,184
26	infospace.com	7,581
27	disney online	6,919
28	goto.com	6,899
29	barnesandnoble.com	6,477
30	iwon.com	6,330
31	askjeeves.com	6,264
32	earthlink.net	5,390

33	espn	5,374
34	freelotto.com	5,276
35	smartbotpro.net	5,199
36	bonzi.com	5,100
37	ivillage sites	4,997
38	sony online	4,853
39	macromedia.com	4,817
40	travelocity.com	4,719
41	cnn.com	4,706
42	windowsmedia.com	4,650
43	cdnow.com	4,616
44	go2net.com	4,605
45	icq.com	4,578
46	pathfinder.com	4,563
47	uproar.com	4,526
48	expedia.com travel	4,493
49	directhit.com	4,451
50	mypoints.com	4,441

Chart Definitions:

;;;(a) Digital Media: includes users of the World Wide Web, proprietary online services, and/or other ad-supported digital applications such as e-mail services and CD ROM.

Top 50 Digital Media & Web Properties:

;;;The top 50 Digital Media & Web properties are based on unduplicated audience reach, also known as unique visitors. "Digital Media & Web Properties" include the largest single brands as well as consolidations of multiple domains that fall under one brand or common ownership.

Top 50 Web Sites:

;;;The top 50 Web sites are based on unduplicated audience reach, also known as unique visitors. Top sites are from Media Metrix' At Home and At Work samples.

Unique Visitors:

;;;The actual number of total users who visited the reported Web site or online property at least once in the given month. All Unique Visitors are unduplicated (only counted once) and are in thousands.

About Media Metrix

;;;Media Metrix, Inc., with over 600 clients, is the leader and pioneer in Internet and Digital Media measurement and the industry's source for the most comprehensive, reliable, and timely audience ratings, e-commerce, advertising and technology measurement services. Through its acquisition of AdRelevance, an innovator in Internet advertising measurement, Media Metrix has expanded its product offering to include comprehensive data on where, when, how and how much Web marketers and their competition are advertising online.

;;;Media Metrix provides leading advertising agencies, new and traditional media companies, e-commerce marketers, financial services companies and technology companies with comprehensive coverage of all Digital Media (including more than 21,000 Web sites and online properties). Media Metrix utilizes its patented metering methodology to measure actual Internet and Digital Media audience usage behavior in real-time - click by click, page by page, minute by minute. Media Metrix offers monthly, weekly, and daily data collection and reporting, and a sample of more than 50,000 people under measurement in the United States. Media Metrix has worldwide operations in the U.K, France, Germany, Canada, Sweden and Australia. For more information about Media Metrix, please visit: [www.mediametrix.com](http://www.mediametrix.com).

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07037302 Supplier Number: 59536508 (THIS IS THE FULLTEXT)  
**Citizens Bank Announces Access To Free Online Tax Preparation and  
Electronic Filing for Eligible Taxpayers.**

Business Wire, p1180  
Feb 17, 2000

TEXT:

Business Editors and High Tech Writers

FLINT, Mich.--(BUSINESS WIRE)--Feb. 17, 2000

Citizens Bank Teams with Intuit to Provide Free Web-based Tax  
Preparation and Filing to Lower Income Taxpayers, as Well as  
Those Taxpayers Eligible to File Form 1040EZ

Citizens Bank, which recently announced that it is offering access to  
online tax preparation and electronic filing services for tax year 1999,  
today announced that it is also participating in the Quicken Tax Freedom  
Project, a public service initiative that makes online tax preparation and  
electronic filing available at no charge to taxpayers with an annual  
adjusted gross income of \$20,000 or less, as well as anyone filing a Form  
1040EZ. This free program applies to both state and federal individual  
income tax returns.

"We are pleased to be able to offer the Quicken Tax Freedom  
service to the communities we serve. This service is in keeping with our  
commitment to public service. We hope that visitors to our Web site will  
take advantage of this free service," said Robert Stone, Vice President  
and Internet Banking Manager.

Citizens Bank is offering access to online tax preparation and  
electronic filing -- at no charge to eligible families and individuals --  
in conjunction with Intuit Inc., (Nasdaq:INTU) the maker of personal  
finance software such as Quicken(R) and Quicken TurboTax(R). Citizens Bank  
will make Intuit's Quicken(R) TurboTax(R) for the Web(SM) and  
TurboTaxEZ(SM) personal tax preparation Web-based products, which enable  
taxpayers to securely and quickly prepare and electronically file their tax  
returns via the Internet, accessible from Citizens Bank's Web site at  
www.cbClientsFirst.com through October 16, 2000.

According to IRS statistics, approximately 45 percent of all  
individual taxpayers are eligible to participate in the Quicken Tax Freedom  
Project. Last year, more than 86,000 eligible tax filers took advantage of  
this no-cost Internet based program, which offers both federal and state  
income tax preparation and filing. In addition, about a quarter of a  
million taxpayers used Quicken **Turbo Tax** for the **Web** to prepare and  
file their taxes via the Web.

**Citizens Bank Offers Quicken TurboTax for the Web to All  
Taxpayers**

As announced earlier this year, Citizens Bank is also providing  
Intuit's Quicken TurboTax for the Web to all taxpayers who don't qualify  
for the free program through its Web site at www.cbClientsFirst.com.  
Taxpayers can go to Citizens Bank's site to prepare and file their  
individual personal federal tax return for \$9.95, and state returns can be  
prepared and filed for any state requiring an income tax for \$9.95. Both  
prices include electronic filing.

Citizens Banking Corporation (Nasdaq:CBCF) is a diversified financial  
services company providing a full range of commercial, consumer, mortgage  
banking, trust, and financial planning services to a broad client base.  
Citizens has nearly \$8 billion in assets and operates more than 220 banking  
offices in Michigan, Wisconsin, Iowa, Minnesota, and suburban Chicago,  
Illinois. Total trust assets are over \$3.8 billion. For more information  
about Citizens Bank, visit www.cbClientsFirst.com.

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07026766 Supplier Number: 59448499 (THIS IS THE FULLTEXT)

**Keystone Financial Announces Access to Free Online Tax Preparation And Electronic Filing for Eligible Taxpayers.**

PR Newswire, p0153

Feb 15, 2000

TEXT:

Keystone Financial Teams with Intuit to Provide Free Web-Based Tax Preparation and Filing to Lower Income Taxpayers, As Well as Those Taxpayers Eligible to File Form 1040EZ  
HARRISBURG, Pa., Feb. 15 /PRNewswire/ -- Keystone Financial (Nasdaq: KSTN), which announced in January that it is offering access to online tax preparation and electronic filing services for tax year 1999, today announced that it is also participating in the Quicken Tax Freedom Project, a public service initiative that makes online tax preparation and electronic filing available at no charge to taxpayers with an annual adjusted gross income of \$20,000 or less, as well as anyone filing a Form 1040EZ. This free program applies to both state and federal individual income tax returns.

Keystone Financial (Nasdaq: KSTN) is offering access to online tax preparation and electronic filing -- at no charge to eligible families and individuals -- in conjunction with Intuit Inc., (Nasdaq: INTU) the maker of personal finance software such as Quicken and Quicken TurboTax. Keystone Financial will make Intuit's Quicken TurboTax for the Web(SM) and TurboTaxEZ(SM) personal tax preparation Web-based products, which enable taxpayers to securely and quickly prepare and electronically file their tax returns via the Internet, accessible from Keystone Financial's website at [www.keyfin.com](http://www.keyfin.com) through October 16, 2000.

According to IRS statistics, approximately 45 percent of all individual taxpayers are eligible to participate in the Quicken Tax Freedom Project. Last year, more than 86,000 eligible tax filers took advantage of this no-cost Internet based program, which offers both federal and state income tax preparation and filing. In addition, about a quarter of a million taxpayers used Quicken Turbo Tax for the Web to prepare and file their taxes via the Web.

As announced earlier this year, Keystone Financial is also providing Intuit's Quicken TurboTax for the Web to all taxpayers who don't qualify for the free program through its website at [www.keyfin.com](http://www.keyfin.com). Taxpayers can go to Keystone Financial's site to prepare and file their individual personal federal tax return for \$9.95, and state returns can also be prepared and filed for any state requiring an income tax for \$9.95. Both prices include electronic filing.

Keystone Financial, Inc. is the fourth largest financial institution headquartered in Pennsylvania, with assets of approximately \$7 billion. It serves customers in Pennsylvania, Maryland and West Virginia through a network of 177 community offices, nearly 500 ATMs, as well as 300 ATMs in WAWA convenience stores, 200 ATMs in Sheetz convenience stores, a Mobile Banking Unit and the Telephone Banking Center, located in Cumberland, MD. Keystone Financial also operates Martindale Andres & Co., an investment-management services provider; Keystone Financial Mortgage Co.; Keystone Brokerage Inc.; and MMC&P, a retirement-benefit services firm. For more information, Keystone Financial can be reached on the Internet at

www.keyfin.com.

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06993854 Supplier Number: 59167181 (THIS IS THE FULLTEXT)

**Republic Bank Offers Income Tax Preparation and Filing Through the Internet.**

Business Wire, pl459

Feb 3, 2000

TEXT:

Business Editors

ST. PETERSBURG, Fla.--(BUSINESS WIRE)--Feb. 3, 2000

Republic Bank, the banking subsidiary of Republic Bancshares Inc. (Nasdaq:REPB) Thursday announced an agreement with Intuit to offer Quicken(R) TurboTax(R) for the Web(SM) through the bank's website [www.republicbankfl.com](http://www.republicbankfl.com), allowing easy and quick access to Intuit's online version of its popular Quicken TurboTax personal tax preparation software program.

TurboTax for the Web enables taxpayers to prepare and file the same federal income tax returns as the No.1-selling Quicken TurboTax desktop software program, but with the added convenience of preparing and filing online through the Internet for the fastest refund possible. And since no trip to the store or downloading of software is required, preparing and filing taxes is faster and easier than ever.

The service is free for anyone filing a Form 1040EZ and is only \$9.95 for 1040 Forms. One does not have to be a customer of Republic Bank to participate.

For additional information, visit Republic Bank's Web site at [www.republicbankfl.com](http://www.republicbankfl.com) and click on the ' **Turbo Tax** for the **Web** ' icon.

About Intuit Inc.

Intuit Inc. (Nasdaq:INTU) is the leader in e-finance, including financial software and Web-based services. Intuit develops and markets Quicken, the leading personal finance software; TurboTax, the best-selling tax preparation software; and QuickBooks(R), the most popular small business accounting software. Intuit's Quicken.com(TM) Website ([www.Quicken.com](http://www.Quicken.com)) is a leading financial Website, offering a comprehensive set of financial news, information and tools, including insurance, mortgage, investment and tax preparation services. Intuit's products and services enable individuals, small businesses and financial professionals to better manage their financial lives and businesses.

About Republic Bank

Republic Bancshares Inc. is one the largest Florida-based bank holding companies with 81 branch offices and approximately \$2.5 billion in assets.

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06955595 Supplier Number: 58729599 (THIS IS THE FULLTEXT)  
**Summit Bank Now Offers Customers Easy, Quick Access To Quicken TurboTax for the Web.**

PR Newswire, p6393  
Jan 20, 2000

TEXT:

PRINCETON, N.J., Jan. 20 /PRNewswire/ -- Summit Bank today announced an agreement with Intuit to offer Quicken(R) TurboTax(R) for the Web(SM) to its customers through its web site [www.summitbank.com](http://www.summitbank.com). This added feature allows easy and quick access to Intuit's online version of its popular Quicken Turbo Tax personal tax preparation software program.

"Summit Bank is including this capability as part of our commitment to offer the best online solution for our customers," said Summit's e-Commerce Director Hilary Blackburn. "Now, not only can our customers bank online, pay bills and apply for loans online, they can complete another basic function: preparing their taxes online."

TurboTax for the Web enables taxpayers to prepare and file all the same federal and state income tax returns as the number one selling Quicken TurboTax desktop software program, but with the added convenience of preparing and filing online for fastest refund. And since no trip to the store or downloading of software is required, preparing and filing taxes is faster and easier than ever.

Pricing and Availability

Quicken Turbo Tax for the Web is available at [www.summitbank.com](http://www.summitbank.com), [www.turbotax.com](http://www.turbotax.com), through the tax areas of Quicken.com ([www.quicken.com](http://www.quicken.com)), America Online and Excite.com, as well as through more than 350 financial institutions, electronic retailer and Internet-related service web sites. Taxpayers can prepare and file their individual personal federal tax return for \$9.95, and state returns can also be prepared and filed for any state requiring an income tax for \$9.95. Both prices include electronic filing. There is no charge for Form 1040EZ filers and those who qualify for the Quicken Tax Freedom Project.

Intuit Inc. (Nasdaq: INTU) is the leader in e-finance, including financial software and Web-based services. Intuit develops and markets Quicken, the leading personal finance software; TurboTax, the best-selling tax preparation software; and QuickBooks(R), the most popular small business accounting software. Intuit's Quicken.com(TM) Website ([www.Quicken.com](http://www.Quicken.com)) is a leading financial Website, offering a comprehensive set of financial news, information and tools, including insurance, mortgage, investment and tax preparation services. Intuit's products and services enable individuals, small businesses and financial professionals to better manage their financial lives and businesses.

Summit Bank is a subsidiary of Summit Bancorp (NYSE: SUB), a regional bank holding company headquartered in Princeton, New Jersey, with \$36 billion in assets, \$25 billion in deposits and a market capitalization of \$5 billion. Through its 500 branches, 600 ATMs and Internet banking, it provides comprehensive financial services to an extensive retail, commercial and private banking customer base in New Jersey, eastern Pennsylvania and Connecticut. For additional information about the company and the markets it serves, please visit its web site at [www.summitbank.com](http://www.summitbank.com).

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06951735 Supplier Number: 58726965 (THIS IS THE FULLTEXT)  
**Fidelity Investments Launches New Online Tax Center, Including Tax Content  
Powered by Quicken.com.**

Business Wire, p1295

Jan 20, 2000

TEXT:

Business Editors

BOSTON--(BUSINESS WIRE)--Jan. 20, 2000

Quicken(R) TurboTax(R) for the Web(sm) Available Free to Fidelity  
Customers and Registered Users Beginning Today

The one in four American taxpayers who put off filing their taxes until April last year and flooded IRS offices with more than 34 million last-minute returns now have a great opportunity to get a jump on this year's April 17th tax filing deadline(1). Fidelity Investments(R) today announced the introduction of its new Online Tax Center, a one-stop information source for tax planning, preparation and electronic filing. The Online Tax Center at [fidelity.com/tax](http://fidelity.com/tax) includes tax information for Fidelity customers, specialized tax content powered by Quicken.com and a free offer to Fidelity customers and registered My Fidelity users of Quicken(R) TurboTax(R) for the Web(sm)--the leading online tax preparation and filing service.

"As people's lives get busier, they are increasingly looking for easy-to-use online strategies for managing their personal finances, including ways to simplify and save time preparing and filing their taxes," said Tracey Curvey, executive vice president, Fidelity Online Brokerage. "Fidelity's Online Tax Center helps meet that need by providing a wealth of tax information from Fidelity and Intuit, including the tools you can use to prepare and file your taxes easily and efficiently. This is another example of the innovative products and services we're making available for Fidelity's online customers."

The Online Tax Center includes helpful tax preparation information from Intuit's leading e-Finance Web site, Quicken.com, including "Smart Strategies," "Taxes Step by Step" and "Tax Tools."

Smart Strategies includes:

- Rates and Rules: A quick guide to all the numbers you need to get your taxes done
- Deduction Center: To help make sure you're maximizing your deductions
- Tax Forms: Fast access to the federal and state tax forms you might need for filing
- Tax Calendar: Important dates for taxpayers

Taxes Step by Step includes:

- Get Organized: Easy steps to determine what documents to keep and what to throw out, to save time come April
- Electrify Your Taxes: A guide to the advantages of electronic tax filing

Tax Tools include:

- 1999 & 2000 TurboTax Tax Estimator: Find ways to cut your 2000 taxes before the end of the year
- Taxes and Inflation Calculator: See how your investment returns could stand up to this double threat

The Online Tax Center also features the following Fidelity tax resources:

- Fidelity customers' personal statements and tax reporting information
- A link to retirement investing, including Fidelity's new NetIRA(sm)
- IRS tax forms available for download
- Frequently Asked Questions on tax forms, retirement account contributions, and related issues

As an added benefit this tax season, Fidelity has also teamed up with Intuit to offer Quicken TurboTax for the Web free to Fidelity online customers as well as to those who register for My Fidelity, a new customizable homepage available at [www.fidelity.com](http://www.fidelity.com). Quicken TurboTax for the Web is Intuit's leading online tax preparation and filing service that leads you through easy-to-understand questions, offers tax-saving tips, and helps speed completion of your tax returns. After you enter your tax data, you simply click a button to file your taxes electronically with the Internal Revenue Service. For those who are eligible for a refund, the IRS says that electronic filers generally receive their refund in as little as 7-10 days.

#### About Fidelity Investments

Fidelity Investments is the nation's largest mutual fund company and a leading provider of financial services. Fidelity offers investment management, retirement, brokerage and shareholder services directly to individuals and institutions, and through financial intermediaries. The firm also is the No. 1 provider of 401(k) retirement savings plans, the second largest discount brokerage firm and the third largest provider of 403(b) retirement plans for not-for-profit institutions in the United States. At November 30, 1999, Fidelity had total managed assets of \$893.8 billion.

(1) Internal Revenue Service: Weekly filing statistics for April 2, 1999 to April 30, 1999.

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11/7/12 (Item 1 from file: 148)

DIALOG(R)File 148:Gale Group Trade & Industry DB  
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10919418 SUPPLIER NUMBER: 54195587 (THIS IS THE FULL TEXT)  
**Battle of the titans. (Microsoft Money 99 and Quicken Deluxe 99 personal financial software) (Brief Article) (Evaluation)**  
Muhammad, Tariq K.  
Black Enterprise, 29, 7, 58(1)  
Feb, 1999

#### TEXT:

Quicken 99 and Money 99 go head to head

Rather than try to topple Intuit's strangle-hold on the personal finance software market, Microsoft tried to buy the company. Fortunately for the consumer, the deal ran afoul of federal antitrust laws and Microsoft was forced to compete with Intuit rather than gobble it whole.

As a result, the two companies have been playing a game of one-upsmanship with each successive release.

There are four basic components on which the Quicken 99 and Money 99

compete: design and ease of use, checking and investing, financial planning and taxes and online banking.

Both Money and Quicken Deluxe use an interface that borrows heavily from the Internet with their browser like navigation buttons and simulated Web page design. They also allow you to customize the opening home page view. While the interface is new for Quicken, Money introduced its version last year and has had time to refine the look. Quicken has made data entry much easier with Quick Entry--a sort of mini-program that starts quickly and lets you make simple adjustments without entering the full program.

The rival programs are also neck and neck in the checking and investing category. Both products handle checking in different, although equally satisfactory manners; however, Quicken uses a more familiar checkbook-style interface. Money and Quicken are adept at everything from stock splits to employee stock options, and you'll likely find all of the investing tools you need. If not, each links to their respective Web based financial sites: Quicken.com and Microsoft Investor. You can also go online to conduct research or download information to your portfolio. One big difference is the cost. Quicken gives you access to its site gratis, while Microsoft Investor charges \$9.95 per month.

In the financial planning realm, Quicken is a distant second to Microsoft's Financial Planner, which is also available as a stand-alone product. Quicken makes a noble attempt with its addition of Quick Plan, but it has nowhere near the muscle of Money's Lifetime Planner. Quicken makes up for this shortcoming by hitting a home run in the tax category. Your purchase of Quicken 99 also gets you a free return prepared by Web **Turbo Tax**, Intuit's Web-based tax preparation service. Besides that, Quicken's TaxPlanner and Deduction Finder are more than up to the task. Money's tax planner is good, but if you're looking for top-notch tax advice you'll have to look elsewhere.

Obviously, the Web is where it's at. Both programs have not only turned to an Internet metaphor for their interface, but they've also begun to incorporate Net-based information and services into the heart of the programs. Online banking is basically a draw with both programs having similar offerings.

Quicken Deluxe 99 and Money 99 are both good choices, with each getting the upper hand in certain categories. If financial planning is your main concern, Money 99 might be the best choice. Otherwise, Quicken Deluxe 99 handles taxes better and it gives you free access to Quicken.com (both are available for Win95/98 or NT4.0). Quicken Deluxe 99 (also available in Home and Business edition)

- \* Retail: \$59.95 (\$20 rebate)

- \* Intuit 800-446-8848 or [www.intuit.com](http://www.intuit.com)

Microsoft Money 99 Financial Suite

- \* Retail: \$64.95 (\$25 rebate)

- \* To purchase call 800-426-9400 or download a free 90-day trial program at [www.microsoft.com/money](http://www.microsoft.com/money).

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11/7/13 (Item 1 from file: 636)

DIALOG(R)File 636:Gale Group Newsletter DB(TM)

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04624554 Supplier Number: 61409467 (THIS IS THE FULLTEXT)

**SALOMON OFFERS FREE ONLINE BILL PAY.**

Waldman, Adelle

Financial Net News, v5, n13, p1

March 27, 2000

TEXT:

Salomon Smith Barney has launched free online bill paying services and access to Quicken's **Turbo Tax** for the **Web**. In addition, the

full-service brokerage has given its account access site (www.smithbarney.com) a complete makeover. While many full-service brokerage firms have offered clients online bill paying, Salomon joins wirehouse rival Merrill Lynch, as the only firms offering the service for free. Merrill currently offers bill payment for no additional charge to clients who enroll in Merrill Lynch Online. Prudential Securities, PaineWebber and Morgan Stanley Dean Witter all charge for the service. Fees hover around \$6 per month.

Kelly O'Donnell, consultant at Cerrulli Associates, said Salomon is making a good move by offering the service at no additional charge to clients because online bill paying is still a fledgling service. "The service will really come into fruition (with mainstream individuals) in three to five years," she predicted, adding that in the meantime firms do well to offer it at no charge to customers who are likely to be skeptical at this point in time. Free bill pay is a way of encouraging wary customers to try the service and become more comfortable carrying out banking functions online. She noted that bill presentment is a "sticky" service--it brings users back to the site, and keeps them logged on. Repeated calls to Salomon were not returned, and a spokeswoman could not provide additional details.

Joan Solotar, research analyst at Donaldson, Lufkin & Jenrette, also observed that Salomon's move reflects the general trend among full-service firms to offer more banking-type services. And it highlights the brokerage's attempt to move closer towards one-stop shopping, O'Donnell added.

Additionally, Salomon has introduced a partnership with Quicken that will bring TurboTax to the Web for Salomon clients. The firm, which introduced Web trading last fall, has simultaneously revamped its site. Now, clients may customize their home page with personal links and also choose from a variety of ways to view their portfolios, including information about borrowing potential for margin accounts. The new site also allows users to browse Salomon's inventory of municipal bonds.

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Subscription: \$1495.00 per year. Published weekly. Circulation

Department, 477 Madison Ave, New York, NY 10022.

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11/7/14 (Item 2 from file: 636)

DIALOG(R)File 636:Gale Group Newsletter DB(TM)

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04581162 Supplier Number: 59425573 (THIS IS THE FULLTEXT)

**E-BROKERAGES TO OFFER TAX PREP SERVICES.**

Waldman, Adelle

Financial Net News, v4, n50, p1

Dec 13, 1999

TEXT:

Fidelity Investments and E\*Trade Securities are gearing up for the tax season to provide clients with Quicken Turbo Tax preparation and filing services. Charles Schwab & Co. is apparently considering a similar arrangement, while some smaller brokerages, including mydiscountbroker.com, Muriel Siebert and Firstrade.com, are also mulling tax preparation assistance for their online services. The Turbo Tax line accounts for the bulk of tax preparation software and/or Web services purchased in the United States, helping users through the tax preparation process and allowing them to file all of their taxes electronically. Brokerages are clamoring to make the product available to customers in an attempt to attract new customers, and to hold on to existing ones, by offering benefits that extend beyond the execution of trades.

"Brokerages can't compete on price alone, so they are trying to

figure out alternative ways to bring value to their services," said analyst Ed Kountz of Tower Group. He cited ancillary services, such as tax preparation assistance, but including also information and guidance in terms of asset allocation, as major components of value. He pointed out this trend raises the bar for brokerages to compete.

Fidelity will make TurboTax for the Web available to all customers, beginning in mid-January. The firm offered **Turbo Tax** for the **Web** to select high-end clients last year. A spokeswoman for Fidelity said that the service was extremely well-received, which prompted the firm to expand the service by making it available to all customers this tax season. After logging into Fidelity's Web site, customers will be able to follow a hyperlink to the TurboTax for the Web venue, which is hosted by Quicken and is the same site that paying customers of TurboTax for the Web use. Fidelity will advertise this benefit on its own and other Web sites, including Yahoo!, CNN.fn and Go.com. It will also alert its existing customers by means of statement inserts, outbound e-mail to customers, and a message in its year-end reports, as well as by placing advertisements in the company's own magazines, Focus and Outlook.

E\*Trade, which partnered with Quicken earlier this year in connection with the firm's Tax Center content, is now also expanding to offer the TurboTax Deluxe software free to anyone who opens a new IRA account with the brokerage. The software, like the Web Service, allows people to prepare and file taxes electronically. A spokesperson for the company believes that the promotion will be successful because there is no minimum deposit to open an E\*Trade IRA. The offer will be publicized on E\*Trade's Web site. The firm will announce further collaboration with Quicken concerning TurboTax in January, said an E\*Trade spokeswoman, declining to elaborate.

Though Schwab, like E\*Trade, partnered with Quicken earlier this year in another capacity, the Web brokerage giant is still weighing a TurboTax deal, said industry insiders. A Schwab official would say only that the firm is continuously looking for ways to help users, declining to comment on any possible deals with TurboTax.

Smaller firms would like to offer to be able to offer their customers an equivalent package. Stan Thomas, v.p. of brokerage services at mydiscountbroker.com said that his firm has considered a Quicken partnership, but they also speaking to four or five other companies. Mitch Cohen, cfo at Muriel Siebert, and Peter Gschweng, v.p. at Firstrade.com, indicated that their firms seek to offer such a service by the following tax season.

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11/7/15 (Item 1 from file: 20)

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10399084 (THIS IS THE FULLTEXT)

1Fort Worth Star-Telegram, Texas, Todd Mason Column  
Todd Mason

KRTBN KNIGHT-RIDDER TRIBUNE BUSINESS NEWS (FORT WORTH STAR-TELEGRAM - TEXAS)

April 04, 2000

YOU MAY PAY IRS ONLINE VIA BANK: Feeling left out because your friends are filing their taxes electronically, and you need to drop a check in the mail?

The fact is that you don't. You can authorize the Internal Revenue Service to take your payment directly from your checking account. You get

confirmation that your return has been received. You can delay the debit until -- oh, let's say April 17, this year's deadline.

The payment technique also works for taxpayers seeking an extension. (The IRS will give you time to settle up as long as you pay what you think you owe.)

No fuss, no muss, and perhaps cheaper than filing on paper.

Start with one of the free online filing services. Fidelity Investments ([www.fidelity.com](http://www.fidelity.com)) offers e-filing via Quicken's **Turbo Tax** on the **Web** without the customary \$9.95 fee. Irving-based H.D. Vest ([www.hdvest.com](http://www.hdvest.com)) offers the same price on its own tax preparation service.

Think of the free services as loss leaders. Fidelity, the mutual fund giant, and Vest hope to get you logged in so they can sell you on the merits of a broader relationship. Vest acts as an investment backshop for financial planners.

Cnet.com rated Turbo Tax and Vest as the top picks in a crowded field of e-filing services. Cnet's editors recommend Turbo Tax for folks who have more complicated returns and need more hand-holding.

Once the math is done, you authorize a direct debit from your bank account by entering your bank's nine-digit routing number and your account number. Call your bank to verify the routing number; the number on your check may be a merger or two behind.

Then settle back and wait for an e-mail telling you that you have a confirmation message waiting from the IRS. Download the confirmation, plus a form to sign and return by conventional mail, and the rest of it is the government's worry.

Peace-of-mind is harder to come by with the U.S. Postal Service in the loop. You can't be sure that you're shed of the taxman until the check clears the bank.

Monitor your bank statement until it does. If the worst happens, you should be able to avoid penalties and interest if you report the problem to the IRS and furnish copies of the errant return and missing check. Consider certified mail if you owe a substantial amount.

On this and other judgment calls, the IRS says only that it decides each case on its merits.

Need more time? Form 4868 automatically buys you an extra four months, but confirmation remains an issue. The IRS wants you to make a good-faith effort to figure out what you owe and pay it. The H.D. Vest site, for one, allows e-filers to file extensions and authorize debits on bank account.

The newer, friendlier IRS is less prickly about extensions. In the bad old days, it would yank your extension if it didn't like your best guess about what you owe. Now your return will be considered timely even if you send no money as long as you pay up before the extension expires.

Strapped taxpayers shouldn't pass up this opportunity. Failing to file on time triggers a whopping penalty. By contrast, failing to pay on time triggers penalties and interest that are relatively modest judged by the standards of credit cards and signature loans.

The IRS is also accepting extensions by phone as long as taxpayers make partial payments by credit card. Call (888) 272-9829. Be aware that the credit card processor will charge a "convenience fee" in addition to your card's customary terms.

Need more than 120 days? Form 9465 allows you to propose an installment plan spanning as many as three years.

Yes, Vest lets you file that one online, too, so you can expect speedy confirmation that your fate rests in the hands of a government bureaucracy. How much comfort is possible under those circumstances is a different column.

Todd Mason's column appears Tuesday, Thursday and Sunday. (817) 390-7552; fax, (817) 390-7774; [toddm@star-telegram.com](mailto:toddm@star-telegram.com)

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11/7/16 (Item 2 from file: 20)  
DIALOG(R) File 20:Dialog Global Reporter  
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10197340 (THIS IS THE FULLTEXT)

**Minnesota Department of Revenue: Expect Delays in Getting Your Refund -- If  
You File a Paper Return**  
PR NEWSWIRE  
March 22, 2000

ST. PAUL, Minn., March 22 /PRNewswire/ -- The Minnesota Department of Revenue is advising taxpayers who have yet to file their state income tax returns to explore options to electronically file their tax returns rather than file on paper. "In the past several years, it normally took about 30 to 40 days to process a paper return and to get refunds into the hands of the taxpayer. Now, we estimate that if filing trends continue, it could take up to 90 to 120 days," said Revenue Commissioner Matt Smith. "If you haven't filed, you don't have to wait that long. File electronically, and you can get your refund in as little as 10 business days," said Smith. There is no delay in processing electronically filed (e-file) returns.

The lengthening delay in processing paper returns is due in part to the expanded Minnesota individual income tax Form M-1. "With this year's form being longer and more complex, operators are averaging 85 to 90 returns an hour, down from 100 last year when the Form M-1 was only 22 lines," said Smith.

According to Commissioner Smith, for the short-term, the department is hiring additional staff to expedite refunds. "But, it is important to remember that even after hiring additional staff, the sheer volume of incoming paper returns will make it difficult for us to get refunds out sooner. Furthermore, we have and will continue to ask taxpayers to file early," said Smith. "In the long-term, we are revamping our individual income tax system through a re-engineering process which we anticipate will result in a dramatically reduced turnaround time by the 2002 filing season."

With fewer than four weeks to go before the tax filing deadline, more than one million of Minnesota's 2.4 million taxpayers have yet to file their state income tax returns. More than half of the last-minute filers will receive refunds.

If you have already filed a paper return, Smith offers two suggestions. "First, please be patient. Wait at least two months before calling about your refund -- the information will not be available until then. When you do call, use our automated system. The system is as current, if not more so, than what a tax representative can tell you. Second, do not file another return -- you won't get your refund any faster, and it will cause headaches for both of us later on."

If you haven't filed yet and are expecting a refund, you can avoid a refund delay by filing your return electronically. But if you file by paper after April 1, expect to wait up to 90 to 120 days to receive your refund.

#### E-file options

There are three ways to e-file -- online via the Internet, telefiling and electronic filing through a tax preparer. With e-file, your return is more accurate and you can expect to receive your refund within 10 business days. "E-file is more efficient because it helps taxpayers avoid mistakes. It does the math for you. And with more options for filing over the Internet, people can prepare and file their returns quickly on their own computers," said Smith.

In tax year 1999, 22 percent (about 1 out of every 5) of all state income tax returns were filed electronically.

#### Online filing

You can buy or download online tax filing software -- some options are free -- and let it guide you through filling out your federal and state tax forms.

This year, three companies -- PrepTax, Turbo Tax for the Web and Fidelity.com -- have links on the Department of Revenue web site at <http://www.taxes.state.mn.us>. Their inclusion does not constitute an endorsement of their products by the state; rather, those providers are linked because they have met the qualifications to file Minnesota individual income tax returns. Shop around and decide which product best fits your needs. Last year, about 22,000 taxpayers filed their taxes online. E-filing through a tax practitioner

E-filing your state and federal tax returns is as easy as asking a tax preparer to do so or taking your completed forms to an authorized transmission site. Check your local phone directory under "Tax Return Transmission-Electronic" for sites in your area. Tax practitioners filed about 54 percent of all returns last year. Filing over the phone (Telefiling)

Taxpayers eligible to file by phone (about 500,000 Minnesotans) received the 1999 Minnesota telefile worksheet and instructions for filing their income tax using a touch-tone phone keypad. If you received the telefile instructions, all you need to do is enter the requested information from your completed telefile worksheet. The Telefile system will calculate your taxable income and the amount of your refund or balance due, and assign a confirmation number as proof that your filing was completed.

More information about electronic filing options is available on the Minnesota Department of Revenue web site at <http://www.taxes.state.mn.us> or by calling 651-296-3781 from the Twin Cities metro area or 800-652-9094 from elsewhere.

/CONTACT: Lynn Andrews of Minnesota Department of Revenue, 651-297-4159, [lynn.andrews@state.mn.us](mailto:lynn.andrews@state.mn.us) / 12:36 EST

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11/7/17 (Item 3 from file: 20)

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09873911 (THIS IS THE FULLTEXT)

**also participating in the Quicken Tax Freedom Project, a public service  
BUSINESS WIRE  
March 02, 2000**

U.S. Global Investors is offering access to online tax preparation and electronic filing -- at no charge to eligible families and individuals -- in conjunction with Intuit Inc. (Nasdaq:INTU), the maker of personal finance software such as Quicken(R) and Quicken TurboTax(R). U.S. Global Investors will make Intuit's Quicken(R) TurboTax(R) for the Web(sm) and TurboTaxEZ(sm) personal tax preparation Web-based products, which enable taxpayers to securely and quickly prepare and electronically file their tax returns via the Internet, accessible from U.S. Global Investors' Web site at [www.usfunds.com](http://www.usfunds.com) through Oct. 16, 2000.

Frank Holmes, Chairman and CEO, said, "The alliance with Quicken(R) works well with U.S. Global's e-commerce strategy. We're taking advantage of technology to make it easy for shareholders to use our funds to pay their taxes and their bills." Holmes added, "I hope many people take advantage of this service and this technology. It is such a time-saver."

According to IRS statistics, approximately 45 percent of all individual taxpayers are eligible to participate in the Quicken Tax Freedom Project. Last year, more than 86,000 eligible tax filers took advantage of



this no-cost Internet-based program, which offers both federal and state income tax preparation and filing. In addition, about a quarter of a million taxpayers used Quicken Turbo Tax for the Web to prepare and file their taxes via the Web.

U.S. Global Investors is also providing Intuit's Quicken TurboTax for the Web to all taxpayers who don't qualify for the free program through its Web site at [www.usfunds.com](http://www.usfunds.com). Taxpayers can go to U.S. Global Investors' site to prepare and file their individual personal federal tax return for \$9.95, and state returns can also be prepared and filed for any state requiring an income tax for \$9.95. Both prices include electronic filing.

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11/7/18 (Item 1 from file: 613)

DIALOG(R) File 613:PR Newswire

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00269200 20000218PHF028 (THIS IS THE FULLTEXT)

**Summit Bank Teams with Intuit to Provide Free Web-Based Tax Preparation And Filing for Eligible Taxpayers**

PR Newswire

Friday, February 18, 2000 13:25 EST

WORD COUNT: 438

**TEXT:**

PRINCETON, N.J., Feb. 18 /PRNewswire/ - Summit Bank, which offers access to online tax preparation and electronic filing services for tax year 1999, today announced that it is also participating in the Quicken Tax Freedom Project. This public service initiative makes online tax preparation and electronic filing available at no charge to taxpayers with an annual adjusted gross income of \$20,000 or less, as well as anyone filing a Form 1040EZ. The free program applies to both state and federal individual income tax returns and is accessible from Summit's Internet website, [www.summitbank.com](http://www.summitbank.com).

The online tax preparation and electronic filing is being offered to eligible families and individuals in conjunction with Intuit Inc. (Nasdaq: INTU), the maker of personal finance software such as Quicken(R) and Quicken TurboTax(R). Through this service, taxpayers can securely and quickly prepare and electronically file their tax returns via the Internet.

"We are participating in this service as part of our commitment to the community," says Summit's e-Commerce Vice President Hilary Blackburn. "Preparing and filing taxes online is a valuable service because it is quick and easy."

According to IRS statistics, approximately 45 percent of all individual taxpayers are eligible to participate in the Quicken Tax Freedom Project. Last year, more than 86,000 eligible tax filers took advantage of this no-cost Internet based program, which offers both federal and state income tax preparation and filing. In addition, about a quarter of a million taxpayers used Quicken Turbo Tax for the Web to prepare and file their taxes via the

Web.

As announced earlier this year, Summit is also providing Intuit's Quicken TurboTax for the Web to all taxpayers who don't qualify for the free program through its Web site at [www.summitbank.com](http://www.summitbank.com). Taxpayers can go to Summit's site to prepare and file their individual personal federal tax return for \$9.95, and state returns can also be prepared and filed for any state requiring an income tax for \$9.95. Both prices include electronic filing.

Summit Bancorp (NYSE: SUB) is a financial services company headquartered in Princeton, New Jersey, with \$36 billion in assets, \$25 billion in deposits and a market capitalization of over \$5 billion. Through its 500 branches, 600 ATMs and e-Commerce offerings through Internet banking, it provides comprehensive financial services to an extensive retail, commercial and private banking customer base in New Jersey, eastern Pennsylvania and Connecticut. For additional information about the company, please visit its web site at [www.summitbank.com](http://www.summitbank.com).

Intuit, the Intuit logo, Quicken, QuickBooks, QuickBooks Pro, and TurboTax, among others, are registered trademarks and/or registered service marks and Quicken TurboTax for the Web and TurboTaxEZ are service marks of Intuit Inc. or one of its subsidiaries.

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18/3,K/1 (Item 1 from file: 9)  
DIALOG(R)File 9:Business & Industry(R)  
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2982159 Supplier Number: 02982159  
**Bridge 21 Offers Online Document Storage**  
(Bridge 21 has launched WyoBeamDocuCenter, a program to let accountants store tax and financial documents online)  
Accounting Technology, v 16, n 10, p 18  
November 2000  
DOCUMENT TYPE: Journal ISSN: 1068-6452 (United States)  
LANGUAGE: English RECORD TYPE: Fulltext  
WORD COUNT: 105

TEXT:  
...1 GB storage, for a company.

"All the business owner or accountant needs is Internet access," notes Layton. A business, or any of its employees, can store tax forms and financial documents in PDF format and download them from anywhere.  
...

18/3,K/2 (Item 2 from file: 9)  
DIALOG(R)File 9:Business & Industry(R)  
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1788457 Supplier Number: 01788457  
**Social Security temporarily unplugs Web site**  
( Internet access to wage and tax records is suspended by Social Security Administration, as of 4/9/97, amid security-related concerns)  
USA Today, v 15, n 146, p 1A+  
April 10, 1997  
DOCUMENT TYPE: National Newspaper ISSN: 0161-7389 (United States)  
LANGUAGE: English RECORD TYPE: Abstract

( Internet access to wage and tax records is suspended by Social Security Administration, as of 4/9/97, amid security-related concerns)

ABSTRACT:  
Internet access to wage and tax records has been suspended by the Social Security Administration, as of 4/9/97, amid concerns...

18/3,K/3 (Item 3 from file: 9)  
DIALOG(R)File 9:Business & Industry(R)  
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1411872 Supplier Number: 01411872 (USE FORMAT 7 OR 9 FOR FULLTEXT)  
**Getting A Universal View**  
(The market for portable documents is estimated to be worth \$20-25 mil, which may double in 1996 to almost \$50 mil; Adobe accounts for 75% of all portable-document sales)  
Information Week, v 0, n 567, p 40+  
February 19, 1996  
DOCUMENT TYPE: Journal ISSN: 8750-6874 (United States)  
LANGUAGE: English RECORD TYPE: Fulltext  
WORD COUNT: 1442

(USE FORMAT 7 OR 9 FOR FULLTEXT)

TEXT:

...rivals. Acrobat's popularity began to grow when the Internal Revenue Service provided copies of **tax forms** published in Acrobat's **PDF print** format through its Web site.

Adding to Acrobat's allure was a decision by The...

**18/3,K/4 (Item 1 from file: 15)**  
DIALOG(R)File 15:ABI/Inform(R)  
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01982596 49237630

**More than a makeover: Introducing the third edition of Appraising Residential Properties**

McKinley, Michael

Appraisal Journal v68n1 PP: 109-110 Jan 2000

ISSN: 0003-7087 JRNL CODE: APJ

WORD COUNT: 981

...TEXT: three approaches to value.

The new textbook contains timely material on technology topics such as:

\* **Electronic access** to public transfer and **tax records**

\* **Electronic data interchange**

-The **Internet** and the World Wide Web as sources of data and as communications media

-The Appraisal...

**18/3,K/5 (Item 2 from file: 15)**  
DIALOG(R)File 15:ABI/Inform(R)  
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01895990 05-46982

**A new Australian regulation for electronic tax records**

Stephens, David O

Information Management Journal v33n2 PP: 69-71 Apr 1999

ISSN: 1050-2343 JRNL CODE: RMQ

WORD COUNT: 1696

...TEXT: Internet.

General Provisions

The general provisions of DTR 97/D4 pertaining to the use of **electronic recordkeeping systems for tax records** are:

Records processed and kept **electronically** must be in a form which ATO staff can **access** and understand in order to ascertain a company's tax liability.

The information contained in...

18/3,K/6 (Item 3 from file: 15)

DIALOG(R)File 15:ABI/Inform(R)

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01890501 05-41493

**Shifting the burden of proof**

Knight, Ray A; Knight, Lee G

Journal of Accountancy vl88n3 PP: 89-96 Sep 1999

ISSN: 0021-8448 JRNL CODE: JAC

WORD COUNT: 4121

...TEXT: fax and e-mail messages are sufficient substantiation.

Sidebar:

**Electronic Storage Requirements**

Many businesses use **electronic** storage systems to keep **tax records** . Such a system prepares, records, transfers, indexes, stores, preserves, **retrieves** and reproduces books and records by either

\* Electronically imaging the documents to an electronic storage...

18/3,K/7 (Item 4 from file: 15)

DIALOG(R)File 15:ABI/Inform(R)

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01771583 04-22574

**Web-based tax resources**

Schmidt, Dennis R; Yancey, William F

Tax Adviser v30n2 PP: 98-105 Feb 1999

ISSN: 0039-9957 JRNL CODE: TAD

WORD COUNT: 3628

...TEXT: step instructions are located at <http://www.adobe.com/prodindex/acrobat/readstep.html>. Most **PDF tax forms** can only be viewed or **printed** ; information cannot be entered directly on the form before **printing** . The IRS, however, recently added several "fill-in" forms to its Website, which allow data...

18/3,K/8 (Item 5 from file: 15)

DIALOG(R)File 15:ABI/Inform(R)

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01625668 02-76657

**Clean and simple storage**

Daffron, Susan C

Life Association News v93n4 PP: 48-50 Apr 1998

ISSN: 0024-3078 JRNL CODE: LAN

WORD COUNT: 984

...TEXT: it if necessary Or you can create secure PDF files that cannot be changed or **printed** . Even the IRS uses Acrobat-you can **download PDF** versions of **tax forms** from the IRS's Web site (Adobe reports that **downloads** of its reader increase dramatically on April 14).

Creating PDF files is quick and easy...

18/3,K/9 (Item 6 from file: 15)

DIALOG(R)File 15:ABI/Inform(R)

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01614915 02-65904

**Electronic storage**

Laffie, Lesli S

Tax Adviser v29n4 PP: 204 Apr 1998

ISSN: 0039-9957 JRNL CODE: TAD

WORD COUNT: 283

ABSTRACT: Rev. Proc. 98-25 offers guidance on the requirements for keeping and providing IRS **access to electronic tax records**. Records must be retained until the statute of limitations expires for a given tax year.

TEXT: Rev. Proc. 98-25 offers guidance on the requirements for keeping and providing IRS **access to electronic tax records**.

The procedure requires taxpayers to retain **electronic** ("machine-sensible") records, for as "long as their contents may become material to the administration..."

18/3,K/10 (Item 7 from file: 15)

DIALOG(R)File 15:ABI/Inform(R)

(c) 2005 ProQuest Info&Learning. All rts. reserv.

01601405 02-52394

**The future of Internet domain names**

Kennedy, Shirley Duglin

Information Today v15n3 PP: 40-41 Mar 1998

ISSN: 8755-6286 JRNL CODE: IFT

WORD COUNT: 2026

...TEXT: Fortunately, there are numerous online resources.

J.K. Lasser's Your Income Tax 1997 is **downloadable** in its entirety at <http://w3.mgr.com/mgr/lasser/toc.html>, in Adobe **PDF** format like the IRS **tax forms** themselves (<http://www.irs.ustreas.gov/forms...>

18/3,K/11 (Item 8 from file: 15)

DIALOG(R)File 15:ABI/Inform(R)

(c) 2005 ProQuest Info&Learning. All rts. reserv.

01416707 00067694

**Internet tools for tax professionals: How to get connected and enjoy immediate benefits**

Cottrell, David M; Worsham, Ronald G

Tax Executive v49n2 PP: 134-145 Mar/Apr 1997

ISSN: 0040-0025 JRNL CODE: TXE

WORD COUNT: 4351

...TEXT: multiple states, which when selected, transfer the user to state tax agency Web sites providing **tax forms**.

Most **tax forms** are available in **PDF** (Portable Document Format) format. Before these tax forms can be read and **printed**, however, the Adobe Acrobat Reader software (<http://www.adobe.com/acrobat/>

readstep.html) must be...

**18/3,K/12** (Item 9 from file: 15)  
DIALOG(R)File 15:ABI/Inform(R)  
(c) 2005 ProQuest Info&Learning. All rts. reserv.

01019375 96-68768  
**The unofficial guide to AACE's project and cost management forum on CompuServe**  
Hollmann, John K  
Cost Engineering v37n4 PP: 19-25 Apr 1995  
ISSN: 0274-9696 JRNL CODE: ACO  
WORD COUNT: 5569

...TEXT: files have a proprietary reader bundled with each file. This year, CompuServe had IRS-approved **tax forms** available in **PDF** format.

## 2.6 Using an Automated **Access** or Offline Navigator Program

As we mentioned earlier, your online time can be minimized by...

**18/3,K/13** (Item 10 from file: 15)  
DIALOG(R)File 15:ABI/Inform(R)  
(c) 2005 ProQuest Info&Learning. All rts. reserv.

00848398 94-97790  
**Portable Document Format: An aid to document swapping**  
Kobiellus, James  
Network World v11n15 PP: 45 Apr 11, 1994  
ISSN: 0887-7661 JRNL CODE: NWW  
WORD COUNT: 1289

...TEXT: them off and fill them out. The forms look identical to the ones the IRS **prints** and distributes. **Tax forms** in **PDF** format are also available on the Internet.

PDF is based on a 7-bit ASCII...

**18/3,K/14** (Item 11 from file: 15)  
DIALOG(R)File 15:ABI/Inform(R)  
(c) 2005 ProQuest Info&Learning. All rts. reserv.

00616425 92-31527  
**How Technology Is Changing Banking**  
Gart, Alan  
Journal of Retail Banking v14n1 PP: 35-43 Spring 1992  
ISSN: 0195-2064 JRNL CODE: JRB  
WORD COUNT: 5123

...TEXT: allow all of the home banking services available by phone, plus options for budgeting, organizing **tax records**, **access** to information **networks** on stocks and bonds, weather reports, travel schedules, current news and sports, and home retail...

**18/3,K/15** (Item 1 from file: 16)  
DIALOG(R)File 16:Gale Group PROMT(R)

(c) 2005 The Gale Group. All rts. reserv.

07489997      Supplier Number: 62899310 (USE FORMAT 7 FOR FULLTEXT)  
**ARCANVS Leads the Way With Secure Identities for Digital Signatures.**  
Business Wire, p2305  
June 23, 2000  
Language: English      Record Type: Fulltext  
Document Type: Newswire; Trade  
Word Count:      639

...      alike, such as fully-automated car loans, home mortgages, court filings, insurance enrollments, medical releases, **access to tax records** , **online** voting and more.

Demonstrating the technology's practical application, the Salt Lake County Recorder's...

**18/3,K/16      (Item 2 from file: 16)**  
DIALOG(R)File 16:Gale Group PROMT(R)  
(c) 2005 The Gale Group. All rts. reserv.

07190672      Supplier Number: 61397709 (USE FORMAT 7 FOR FULLTEXT)  
**govWorks Launches Comprehensive Online Tax Solution; Filing Federal and State Taxes Just Got Easier.**  
PR Newswire, p6885  
April 7, 2000  
Language: English      Record Type: Fulltext  
Document Type: Newswire; Trade  
Word Count:      822

...      part of the Tax Category in the govWorks FAQ section.  
-- Federal Forms: Enables users to **download** appropriate **tax forms** and instructions in **PDF** format. There are approximately 100 direct links to forms in the IRS site. In addition...

**18/3,K/17      (Item 3 from file: 16)**  
DIALOG(R)File 16:Gale Group PROMT(R)  
(c) 2005 The Gale Group. All rts. reserv.

07155319      Supplier Number: 60963010 (USE FORMAT 7 FOR FULLTEXT)  
**Resources for Web Buying. (Directory)**  
Savetz, Kevin; Gardiner, Peace  
Computer Shopper, p199  
May, 2000  
Language: English      Record Type: Fulltext  
Article Type: Directory  
Document Type: Magazine/Journal; Trade  
Word Count:      9669

...      response service offers IRS tax forms for individuals and businesses

At TaxKit.com you can **download** federal and state **tax forms** and publications in **PDF** format, file your return online, or use the directory to find an accountant.  
taxpenalty.com...



18/3,K/18 (Item 4 from file: 16)  
DIALOG(R)File 16:Gale Group PROMT(R)  
(c) 2005 The Gale Group. All rts. reserv.

07000818 Supplier Number: 59198830 (USE FORMAT 7 FOR FULLTEXT)  
**Resources for Web Buying. (Buyers Guide)**  
Savetz, Kevin; Gardiner, Peace  
Computer Shopper, p203  
March, 2000  
Language: English Record Type: Fulltext  
Article Type: Buyers Guide  
Document Type: Magazine/Journal; Trade  
Word Count: 9887

... response service offers IRS tax forms for individuals and businesses

At TaxKit.com you can **download** federal and state **tax forms** and publications in **PDF** format, file your return online using WebTurboTax, or use the directory to find an accountant...

18/3,K/19 (Item 5 from file: 16)  
DIALOG(R)File 16:Gale Group PROMT(R)  
(c) 2005 The Gale Group. All rts. reserv.

06976983 Supplier Number: 59023529 (USE FORMAT 7 FOR FULLTEXT)  
**TaxCut TurboTax Offer More; Microsoft's TaxSaver Falls Short. (Software Review) (Evaluation)**  
Arar, Yardena  
PC World, v18, n2, p66  
Feb, 2000  
Language: English Record Type: Fulltext Abstract  
Article Type: Evaluation  
Document Type: Magazine/Journal; General Trade  
Word Count: 1413

... product is expected to include at least one new feature: It will permit you to **download** finished **tax forms** in Adobe Acrobat . **pdf** file format simplifying the process of saving and **printing** returns.

HRBlock.com promises most of the features of its shrink-wrapped sibling TaxCut. You...

18/3,K/20 (Item 6 from file: 16)  
DIALOG(R)File 16:Gale Group PROMT(R)  
(c) 2005 The Gale Group. All rts. reserv.

06451006 Supplier Number: 55040282 (USE FORMAT 7 FOR FULLTEXT)  
**Money Released for Computer Modernization, IRS Strategy Wins Support.**  
PR Newswire, p3406  
June 30, 1999  
Language: English Record Type: Fulltext  
Document Type: Newswire; Trade  
Word Count: 867

... electronic filing by taxpayers in 2007.

\* Using new technology to allow IRS workers to quickly **retrieve tax records electronically** while guaranteeing the security and privacy of

taxpayers.

"To improve service to taxpayers, we need...

**18/3,K/21 (Item 7 from file: 16)**

DIALOG(R)File 16:Gale Group PROMT(R)

(c) 2005 The Gale Group. All rts. reserv.

06233346 Supplier Number: 54270403 (USE FORMAT 7 FOR FULLTEXT)

**IRS: New effort at modernizing must start fresh. (Government Activity)**

DOROBK, CHRISTOPHER J.

Government Computer News, v18, n7, p1(1)

March 29, 1999

Language: English Record Type: Fulltext

Document Type: Magazine/Journal; Tabloid; Trade

Word Count: 529

... customer service representatives.

\* Roll out a new generation of PCs to let IRS workers quickly  
**retrieve tax records electronically** while guaranteeing taxpayer  
security and privacy.

\* Expand electronic filing and electronic payment options.

\* Pilot electronic...

**18/3,K/22 (Item 8 from file: 16)**

DIALOG(R)File 16:Gale Group PROMT(R)

(c) 2005 The Gale Group. All rts. reserv.

06188505 Supplier Number: 54083649 (USE FORMAT 7 FOR FULLTEXT)

**BCL Computers Announces TAXReady, a Complete PDF Solution for Preparing Tax  
Returns.**

Business Wire, p1050

March 12, 1999

Language: English Record Type: Fulltext

Document Type: Newswire; Trade

Word Count: 350

... PDF to other formats, the only way to make copies of tax returns is  
to **print** the forms out.

BCL Freebird (TAXReady edition) allows users to convert **PDF** into  
TIFF, making **tax forms** completely un-editable, ready to be digitally  
archived (The TIFF file is rendered at 300...

**18/3,K/23 (Item 9 from file: 16)**

DIALOG(R)File 16:Gale Group PROMT(R)

(c) 2005 The Gale Group. All rts. reserv.

05997805 Supplier Number: 53377236 (USE FORMAT 7 FOR FULLTEXT)

**IRS Moves Forward With Computer Modernization, Selects Prime Contractor.**

PR Newswire, p4328

Dec 9, 1998

Language: English Record Type: Fulltext

Document Type: Newswire; Trade

Word Count: 869

... taxes

electronically.

\* Designing a new generation of work stations that allow IRS workers

to

quickly retrieve tax records electronically while  
guaranteeing the  
security and privacy of taxpayers.  
"In time, this project will touch on...

18/3,K/24 (Item 10 from file: 16)  
DIALOG(R)File 16:Gale Group PROMT(R)  
(c) 2005 The Gale Group. All rts. reserv.

05864983 Supplier Number: 53018388 (USE FORMAT 7 FOR FULLTEXT)  
**NVTC to Honor Legislative Champions at 'Poli-Techs' Awards Reception.**  
PR Newswire, p6341  
Sept 21, 1998  
Language: English Record Type: Fulltext  
Document Type: Newswire; Trade  
Word Count: 557

... E. Phillips (D-Castlewood)  
\* Sponsor of legislation to expand electronic filings of legal  
documents  
and access to certain revenue and tax records via the Internet  
The Northern Virginia Technology Council (NVTC) is the voice of  
technology business, driving success for...

18/3,K/25 (Item 1 from file: 148)  
DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

12361273 SUPPLIER NUMBER: 62599332 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Collection Development, from Text to Technology.**  
Foster, Janet  
Computers in Libraries, 20, 6, 34  
June, 2000  
ISSN: 1041-7915 LANGUAGE: English RECORD TYPE: Fulltext  
WORD COUNT: 2813 LINE COUNT: 00230

... the software/hardware/multimedia requirements to support selected  
sites. During tax season, Danbury Public Library downloads dozens of tax  
forms in PDF format and prints them using the Adobe Acrobat.  
Providing access to complementary software applications on local  
computers is essential.  
Currency  
Revision dates should be clearly...

18/3,K/26 (Item 2 from file: 148)  
DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

12329129 SUPPLIER NUMBER: 62324497 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Public/private partnership builds online GIS. (county government provides  
online access to land and tax records ) (Brief Article)**  
American City & County, 115, 6, 18  
May, 2000  
DOCUMENT TYPE: Brief Article ISSN: 0149-337X LANGUAGE: English  
RECORD TYPE: Fulltext  
WORD COUNT: 416 LINE COUNT: 00034

**Public/private partnership builds online GIS.(county government provides  
online access to land and tax records )(Brief Article)**

**18/3,K/27 (Item 3 from file: 148)**

DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

10408643 SUPPLIER NUMBER: 21036612 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Security Blanket.(need for Internet security policies) (Industry Trend or  
Event)**

Yasin, Rutrell

InternetWeek, n728, p31(1)

August 17, 1998

ISSN: 1096-9969 LANGUAGE: English RECORD TYPE: Fulltext

WORD COUNT: 1686 LINE COUNT: 00139

... to rethink security policies when it installed a new network  
infrastructure. To give the public **online access to tax records** ,  
election information or property deeds, the government moved from a classic  
Banyan Systems Inc. VINES...

**18/3,K/28 (Item 4 from file: 148)**

DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

09070170 SUPPLIER NUMBER: 18383278 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Friendly CD-ROMs from the federal government.(includes related articles on  
directories and selections of CD-ROM titles produced by the federal  
government)**

Lamont, Judith

Computers in Libraries, v16, n6, p68(7)

June, 1996

ISSN: 1041-7915 LANGUAGE: English RECORD TYPE: Fulltext; Abstract

WORD COUNT: 5036 LINE COUNT: 00397

... publications approved before January 15, 1996. It covers past  
versions, dating back to 1991.

Federal **Tax Forms** uses **PDF** for viewing and **printing** forms. If  
the user knows the number of the form that is sought, finding it...

**18/3,K/29 (Item 5 from file: 148)**

DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

08482642 SUPPLIER NUMBER: 18020504 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Getting a universal view. (viewer software for reading documents created  
with applications the user does not have) (Technology Information)**

Chabrow, Eric R.

InformationWeek, n567, p40(4)

Feb 19, 1996

ISSN: 8750-6874 LANGUAGE: English RECORD TYPE: Fulltext; Abstract

WORD COUNT: 1485 LINE COUNT: 00123

... rivals. Acrobat's popularity began to grow when the Internal  
Revenue Service provided copies of **tax forms** published in Acrobat's  
**PDF print** format through its Web site.

Adding to Acrobat's allure was a decision by The...

**18/3,K/30 (Item 6 from file: 148)**

DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

07735363 SUPPLIER NUMBER: 16714290

**Scientology search case before judge: church says ex-minister put its data on Internet.**

Blum, Andrew

National Law Journal, v17, n27 , Mon ed, col 1, pA7

March 6, 1995

ISSN: 0162-7325

LANGUAGE: ENGLISH

RECORD TYPE: ABSTRACT

...ABSTRACT: of Scientology is suing a former minister, a computer bulletin board operator and an Internet **access** provider for copyright infringement after the former minister released church **tax records** onto the **Internet** . Ex-minister Dennis Erlich's computer records have been seized. The bulletin board operator and...

**18/3,K/31 (Item 7 from file: 148)**

DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv..

07186669 SUPPLIER NUMBER: 15040477

(USE FORMAT 7 OR 9 FOR FULL TEXT)

**To the editor. (Letter to the Editor)**

InfoWorld, v16, n9, p40(1)

Feb 28, 1994

DOCUMENT TYPE: Letter to the Editor

ISSN: 0199-6649

LANGUAGE:

ENGLISH RECORD TYPE: FULLTEXT

WORD COUNT: 1212 LINE COUNT: 00098

... electronic mail to: tax-forms@scubed.com. This server contains all IRS and most state **tax forms** in Adobe **PDF** , PostScript, and TIFF .  
formats for **downloading** .

William J. Proffer

S-Cubed, A Division of Maxwell Labs

San Diego

proffer@scubed.com...

**18/3,K/32 (Item 8 from file: 148)**

DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

07042269 SUPPLIER NUMBER: 15089637

**Feds choose Adobe for CDs. (government publications on CD-ROM use Adobe Acrobat document processing software)**

Anthes, Gary H.

Computerworld, v28, n12, p49(1)

March 21, 1994

ISSN: 0010-4841

LANGUAGE: ENGLISH

RECORD TYPE: ABSTRACT

...ABSTRACT: Acrobat Reader enables Apple Macintosh, MS-DOS, Microsoft Windows or Unix users to display, alter, **print** and search through formatted documents produced in any of those operating systems. The **PDF** -formatted budget and **tax forms** can be viewed exactly as they appear on paper. Word search software is also included...

**18/3,K/33 (Item 1 from file: 275)**

DIALOG(R)File 275:Gale Group Computer DB(TM)

(c) 2005 The Gale Group. All rts. reserv.

02377359 SUPPLIER NUMBER: 59700906 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**Resources for Web Buying. (News Briefs)**

Savetz, Kevin; Gardiner, Peace

Computer Shopper, 199

April, 2000

ISSN: 0886-0556 LANGUAGE: English RECORD TYPE: Fulltext

WORD COUNT: 10101 LINE COUNT: 00879

... response service offers IRS tax forms for individuals and businesses

At TaxKit.com you can **download** federal and state **tax forms** and publications in **PDF** format, file your return online, or use the directory to find an accountant.

taxpenalty.com...

**18/3,K/34 (Item 2 from file: 275)**

DIALOG(R)File 275:Gale Group Computer DB(TM)

(c) 2005 The Gale Group. All rts. reserv.

02278873 SUPPLIER NUMBER: 54135189 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**FOSE - New Approach To IRS Systems Modernization Vowed 03/16/99.**

Newsbytes, NA

March 16, 1999

LANGUAGE: English RECORD TYPE: Fulltext

WORD COUNT: 596 LINE COUNT: 00051

... customer service representatives.

- Roll out a new generation of PCs to let IRS workers quickly **retrieve tax records electronically** while guaranteeing taxpayer security and privacy.

- Expand electronic filing and electronic payment options.

- Pilot electronic...

**18/3,K/35 (Item 3 from file: 275)**

DIALOG(R)File 275:Gale Group Computer DB(TM)

(c) 2005 The Gale Group. All rts. reserv.

01101280 SUPPLIER NUMBER: 00555527

**Telecommunications Brokerage: Buy and Sell in Minutes.**

Commodore, v5, n3, p19

July-Aug., 1984

ISSN: 0744-8724 LANGUAGE: ENGLISH RECORD TYPE: ABSTRACT

...ABSTRACT: Phase I features trading of stocks and options and creation of user-defined portfolio and **tax records**. Phase II features mutual fund trading, **electronic** mail service to a Fidelity Investor Center and on-line **access** to Fidelity's asset management account and the user's own Fidelity Brokerage account. The...

**18/3,K/36 (Item 1 from file: 20)**

DIALOG(R)File 20:Dialog Global Reporter

(c) 2005 The Dialog Corp. All rts. reserv.

09686188 (USE FORMAT 7 OR 9 FOR FULLTEXT)

**Ceridian Tax Service Selects Optika eMedia; Web-Based Enterprise Software  
Will Enhance Customer Service**

BUSINESS WIRE

February 22, 2000

JOURNAL CODE: WBWE LANGUAGE: English RECORD TYPE: FULLTEXT

WORD COUNT: 368

(USE FORMAT 7 OR 9 FOR FULLTEXT)

... use Optika eMedia to share transaction information across the enterprise and streamline business processes through **electronic** workflow automation. By automating **tax record** preparation, routing, updating and faxing; reducing **printing** and copying time; and making information more readily available, Optika eMedia will significantly accelerate response...

**18/3,K/37 (Item 2 from file: 20)**

DIALOG(R)File 20:Dialog Global Reporter

(c) 2005 The Dialog Corp. All rts. reserv.

05307490 (USE FORMAT 7 OR 9 FOR FULLTEXT)

**The Boston Globe Plugged-In Column**

Simson L. Garfinkel

KRTBN KNIGHT-RIDDER TRIBUNE BUSINESS NEWS (BOSTON GLOBE - MASSACHUSETTS)

May 13, 1999

JOURNAL CODE: KBGL LANGUAGE: English RECORD TYPE: FULLTEXT

WORD COUNT: 914

(USE FORMAT 7 OR 9 FOR FULLTEXT)

... documents are designed to look and print the same on every combination of computer and **printer**. That's why the Internet Revenue Service distributes **tax forms** in **PDF** format, and why a growing number of scientists are using Acrobat and PDF to distribute...

**18/3,K/38 (Item 3 from file: 20)**

DIALOG(R)File 20:Dialog Global Reporter

(c) 2005 The Dialog Corp. All rts. reserv.

04656882 (USE FORMAT 7 OR 9 FOR FULLTEXT)

**FOSE - New Approach To IRS Systems Modernization Vowed**

Christopher J Dorobek

NEWSBYTES

March 16, 1999

JOURNAL CODE: FNEW LANGUAGE: English RECORD TYPE: FULLTEXT

WORD COUNT: 554

(USE FORMAT 7 OR 9 FOR FULLTEXT)

... customer service representatives.

\* Roll out a new generation of PCs to let IRS workers quickly **retrieve tax records electronically** while guaranteeing taxpayer security and privacy.

\* Expand electronic filing and electronic payment options.

\* Pilot electronic...

18/3,K/39 (Item 4 from file: 20)  
DIALOG(R)File 20:Dialog Global Reporter  
(c) 2005 The Dialog Corp. All rts. reserv.

03693561 (USE FORMAT 7 OR 9 FOR FULLTEXT)  
**Tech Expo 98 Exhibitor Profiles, N through Z; Conference -2-**  
BUSINESS WIRE  
December 08, 1998  
JOURNAL CODE: WBWE LANGUAGE: English RECORD TYPE: FULLTEXT  
WORD COUNT: 1120

(USE FORMAT 7 OR 9 FOR FULLTEXT)

... touchnet.com, tbacca@touchnet.com URL: www.touchnet.com  
The TouchNet solution creates convenient universal access to mission-critical applications like court records, tax records, or payment transactions via World Wide Web, touch-tone telephone (IVR), touchscreen kiosk, and payment systems. All of these access devices are...

18/3,K/40 (Item 1 from file: 810)  
DIALOG(R)File 810:Business Wire  
(c) 1999 Business Wire . All rts. reserv.

0949515 BW1665

**TECH EXPO NEWS 3: Tech Expo 98 Exhibitor Profiles, N through Z; Conference and Expo to be held Dec. 8-10 in Los Angeles**

December 08, 1998

Byline: Business Editors/High-Tech Writers

...touchnet.com,  
tbacca@touchnet.com  
URL: www.touchnet.com  
The TouchNet solution creates convenient universal access to mission-critical applications like court records, tax records, or payment transactions via World Wide Web, touch-tone telephone (IVR), touchscreen kiosk, and payment systems. All of these access devices are...

18/3,K/41 (Item 1 from file: 813)  
DIALOG(R)File 813:PR Newswire  
(c) 1999 PR Newswire Association Inc. All rts. reserv.

1317768 DCTH051B  
**1998 NVTC Tech Ten Awards Honor Legislative Champions**

DATE: July 30, 1998 17:11 EDT WORD COUNT: 555

...E. Phillips (D-Castlewood)

Sponsor of legislation to expand electronic filings of legal documents

and access to certain revenue and tax records via the Internet



For further information, contact Doug Koelemay, NVTC's government affairs manager, at 703-904-7878...

21/3,K/1 (Item 1 from file: 15)  
DIALOG(R)File 15:ABI/Inform(R)  
(c) 2005 ProQuest Info&Learning. All rts. reserv.

00683721 93-32942

**Optical disk to the rescue**

Tenalio, Michael  
American City & County v108n3 PP: 10 Mar 1993  
ISSN: 0149-337X JRNL CODE: AMC  
WORD COUNT: 956

...TEXT: the document's life, along with long-term archival storage.

For example, with licensing and **tax documents**, **past** experience might suggest **retrievals** will be frequent for several months right after they are issued, but within a few...

21/3,K/2 (Item 1 from file: 148)  
DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

06518180 SUPPLIER NUMBER: 13560466 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Optical disk to the rescue. (information storage and retrieval systems)**  
**(Information Technology) (Column)**  
Tenalio, Michael  
American City & County, v108, n3, p10(1)  
March, 1993  
DOCUMENT TYPE: Column ISSN: 0149-337X LANGUAGE: ENGLISH  
RECORD TYPE: FULLTEXT; ABSTRACT  
WORD COUNT: 1014 LINE COUNT: 00078

... the document's life, along with long-term archival storage. For example, with licensing and **tax documents**, **past** experience suggest **retrievals** will be frequent for several months right after they are issued, but within a few...

21/3,K/3 (Item 1 from file: 20)  
DIALOG(R)File 20:Dialog Global Reporter  
(c) 2005 The Dialog Corp. All rts. reserv.

22941945 (USE FORMAT 7 OR 9 FOR FULLTEXT)  
**New Tax Compliance Software Product Launched By Deloitte & Touche**  
Patrick Lawlor, Zafinance Editorial Director  
ITWEB (SOUTH AFRICA) (AAGM)  
May 22, 2002  
JOURNAL CODE: FITW LANGUAGE: English RECORD TYPE: FULLTEXT  
WORD COUNT: 550

(USE FORMAT 7 OR 9 FOR FULLTEXT)

... are linked and cross-referenced, creating consistent data and eliminating data re-entry, he notes. **Previous tax returns** are also instantly **accessible** in electronic format and year-end balances rolled forward.

Freer explains that there are also...

21/3,K/4 (Item 2 from file: 20)

DIALOG(R)File 20:Dialog Global Reporter  
(c) 2005 The Dialog Corp. All rts. reserv.

16351888 (USE FORMAT 7 OR 9 FOR FULLTEXT)

**PLM Group reports 370% increase in fourth quarter earnings**

CANADA NEWSWIRE

April 25, 2001

JOURNAL CODE: WCNW LANGUAGE: English RECORD TYPE: FULLTEXT

WORD COUNT: 1378

(USE FORMAT 7 OR 9 FOR FULLTEXT)

... the year grew 7.4% (\$6.1 million) over 1999 while pre-tax income from **print** and related operations grew \$1.5 million (55%) over the **previous** year. Overall pre- **tax** **return** on sales jumped 47% for the year to 4.7% from 3.2% in 1999...

**21/3,K/5 (Item 3 from file: 20)**

DIALOG(R)File 20:Dialog Global Reporter

(c) 2005 The Dialog Corp. All rts. reserv.

07949385 (USE FORMAT 7 OR 9 FOR FULLTEXT)

**Money Marketing: Technology:McKENNA'S VIEW: Taxing tasks made easier - Ian**

**McKenna is a consultant and director of The Financial Technology Centre.**

**He can be contacted by email at: IanMcKenna@MSN.com Tel: 0171-359 5656.**

**Fax: 0171-359 2858**

MONEY MARKETING, p36

October 21, 1999

JOURNAL CODE: FMMG LANGUAGE: English RECORD TYPE: FULLTEXT

WORD COUNT: 1047

(USE FORMAT 7 OR 9 FOR FULLTEXT)

... users to submit specific questions to an expert panel. There is a full archive of **previous** questions.

The **Tax** **Return** Filler allows users to **download** a list of additional forms required by the Revenue in a wide range of areas...

**21/3,K/6 (Item 1 from file: 476)**

DIALOG(R)File 476:Financial Times Fulltext

(c) 2005 Financial Times Ltd. All rts. reserv.

0006525700 BOCBIAHACRFT

**Finance & the Family: Why cheating does not pay - The taxman will catch up with you eventually**

CAROLINE GARNHAM

Financial Times, P VI

Saturday, February 8, 1992

DOCUMENT TYPE: NEWSPAPER LANGUAGE: ENGLISH RECORD TYPE: FULLTEXT

Word Count: 1,090

...what the Revenue does not know, the Revenue cannot tax. But remember: the Revenue has **access** to all your **tax** **returns** from **previous** years and is encouraged to have its ears to the ground and its eyes everywhere...

23/3,K/1 (Item 1 from file: 16)  
DIALOG(R)File 16:Gale Group PROMT(R)  
(c) 2005 The Gale Group. All rts. reserv.

10097531 Supplier Number: 90611443 (USE FORMAT 7 FOR FULLTEXT)  
**Intuit Flexes Muscles As Silicon Valley Sags; The company behind popular software including TurboTax, Quicken and QuickBooks has expanded its product line, spent \$490 million on six acquisitions and built one of the industry's most successful online subscription services.**  
Liedtke, Michael; Writer, AP Business  
InformationWeek, pNA  
August 21, 2002  
Language: English Record Type: Fulltext  
Document Type: Magazine/Journal; Professional Trade  
Word Count: 955

... Morgan H&Q.  
The 19-year-old company is building upon the popularity of its **TurboTax** software with an online edition that is rapidly winning over new converts to electronic **tax returns**. In the **past** year, 2.1 million customers, an 80 percent increase from the previous year, paid a...

23/3,K/2 (Item 2 from file: 16)  
DIALOG(R)File 16:Gale Group PROMT(R)  
(c) 2005 The Gale Group. All rts. reserv.

08214138 Supplier Number: 69056700 (USE FORMAT 7 FOR FULLTEXT)  
**E-Filing Completely Paperless With Quicken TurboTax; Now Even Easier to Get a Tax Refund Fast.**  
Business Wire, p2077  
Jan 12, 2001  
Language: English Record Type: Fulltext  
Document Type: Newswire; Trade  
Word Count: 1222

... to send any signed forms when electronically filing a federal tax return.

When taxpayers use **TurboTax** or the Quicken **TurboTax** for the Web(SM) service, which both support the new program, they are guided through...

...asks the taxpayer to include their adjusted gross income and some tax information from their **previous** year's **tax return**. Selecting a PIN number and providing the other personal tax information serves as the taxpayer...

23/3,K/3 (Item 1 from file: 148)  
DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

14948547 SUPPLIER NUMBER: 90611443 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Intuit Flexes Muscles As Silicon Valley Sags; The company behind popular software including TurboTax, Quicken and QuickBooks has expanded its product line, spent \$490 million on six acquisitions and built one of the industry's most successful online subscription services.**  
Liedtke, Michael; Writer, AP Business  
InformationWeek, NA  
August 21, 2002

ISSN: 8750-6874      LANGUAGE: English      RECORD TYPE: Fulltext  
WORD COUNT: 955      LINE COUNT: 00079

... TurboTax software with an online edition that is rapidly winning over new converts to electronic **tax returns**. In the **past** year, 2.1 million customers, an 80 percent increase from the previous year, paid a...

**23/3,K/4      (Item 2 from file: 148)**

DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

12963701      SUPPLIER NUMBER: 69056700      (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**E-Filing Completely Paperless With Quicken TurboTax; Now Even Easier to Get a Tax Refund Fast.**

Business Wire, 2077

Jan 12, 2001

LANGUAGE: English      RECORD TYPE: Fulltext

WORD COUNT: 1222      LINE COUNT: 00103

... asks the taxpayer to include their adjusted gross income and some tax information from their **previous** year's **tax return**. Selecting a PIN number and providing the other personal tax information serves as the taxpayer...

**23/3,K/5      (Item 3 from file: 148)**

DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

04866625      SUPPLIER NUMBER: 09606039      (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Developers give tax software a boost with major upgrades. (1990 tax packages offer enhanced help, audit flags, electronic filing features) (product announcement)**

Ferranti, Marc

PC Week, v7, n46, p39(2)

Nov 19, 1990

DOCUMENT TYPE: product announcement      ISSN: 0740-1604      LANGUAGE:

ENGLISH      RECORD TYPE: FULLTEXT; ABSTRACT

WORD COUNT: 535      LINE COUNT: 00042

... priced at \$75, comes with a tax planner module that lets users compare current and **past tax returns**.

Accompanying this release is TurboTax for the Macintosh, an \$89 version that features comparable functionality...

**23/3,K/6      (Item 1 from file: 275)**

DIALOG(R)File 275:Gale Group Computer DB(TM)  
(c) 2005 The Gale Group. All rts. reserv.

02638533      SUPPLIER NUMBER: 90611443      (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Intuit Flexes Muscles As Silicon Valley Sags; The company behind popular software including TurboTax, Quicken and QuickBooks has expanded its product line, spent \$490 million on six acquisitions and built one of the industry's most successful online subscription services.**

Liedtke, Michael; Writer, AP Business

InformationWeek, NA

August 21, 2002

ISSN: 8750-6874      LANGUAGE: English      RECORD TYPE: Fulltext

WORD COUNT: 955 LINE COUNT: 00079

... Morgan H&Q.

The 19-year-old company is building upon the popularity of its **TurboTax** software with an online edition that is rapidly winning over new converts to electronic **tax returns**. In the **past** year, 2.1 million customers, an 80 percent increase from the previous year, paid a...

23/3,K/7 (Item 2 from file: 275)

DIALOG(R)File 275:Gale Group Computer DB(TM)

(c) 2005 The Gale Group. All rts. reserv.

01383499 SUPPLIER NUMBER: 09606039 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**Developers give tax software a boost with major upgrades. (1990 tax packages offer enhanced help, audit flags, electronic filing features) (product announcement)**

Ferranti, Marc

PC Week, v7, n46, p39(2)

Nov 19, 1990

DOCUMENT TYPE: product announcement ISSN: 0740-1604 LANGUAGE:

ENGLISH RECORD TYPE: FULLTEXT; ABSTRACT

WORD COUNT: 535 LINE COUNT: 00042

... a function that walks users through the system via a series of pop-up windows. **TurboTax** Personal 1040, priced at \$75, comes with a tax planner module that lets users compare current and **past tax returns**.

Accompanying this release is TurboTax for the Macintosh, an \$89 version that features comparable functionality...

23/3,K/8 (Item 1 from file: 621)

DIALOG(R)File 621:Gale Group New Prod. Annou. (R)

(c) 2005 The Gale Group. All rts. reserv.

02779848 Supplier Number: 69056700 (USE FORMAT 7 FOR FULLTEXT)

**E-Filing Completely Paperless With Quicken TurboTax; Now Even Easier to Get a Tax Refund Fast.**

Business Wire, p2077

Jan 12, 2001

Language: English Record Type: Fulltext

Document Type: Newswire; Trade

Word Count: 1222

... to send any signed forms when electronically filing a federal tax return.

When taxpayers use **TurboTax** or the Quicken **TurboTax** for the Web(SM) service, which both support the new program, they are guided through...

...asks the taxpayer to include their adjusted gross income and some tax information from their **previous** year's **tax return**. Selecting a PIN number and providing the other personal tax information serves as the taxpayer...

23/3,K/9 (Item 1 from file: 636)

DIALOG(R)File 636:Gale Group Newsletter DB(TM)

(c) 2005 The Gale Group. All rts. reserv.

02530188      Supplier Number: 45099789    (USE FORMAT 7 FOR FULLTEXT)  
**PERSONAL FINANCE: RECORD NUMBER OF AMERICANS TO FILE TAX RETURNS WITH TAX  
SOFTWARE; FALLING COMPUTER PRICES & IMPROVED TAX SOFTWARE USABILITY  
PROPEL GROWTH**

EDGE: Work-Group Computing Report, v5, n232, pN/A  
Oct 31, 1994  
Language: English      Record Type: Fulltext  
Document Type: Newsletter; Trade  
Word Count:    1935

...      the award-winning EasyStep system have been made even better. The result is a 1994 **TurboTax** program that is not only the easiest tax software to use, but the fastest and smartest way for consumers to prepare their own **tax returns** .

"Over the **past** 10 years, consumers have made **TurboTax** the country's No. 1 best-selling tax preparation software because it's been the ...

...of hours of research and thousands of customer suggestions have gone into this year's **TurboTax** . It's easier to use, offers more tax advice and get users through their returns...

**23/3,K/10      (Item 1 from file: 20)**  
DIALOG(R)File 20:Dialog Global Reporter  
(c) 2005 The Dialog Corp. All rts. reserv.

14619362    (USE FORMAT 7 OR 9 FOR FULLTEXT)  
**E-Filing Completely Paperless With Quicken TurboTax; Now Even Easier to Get  
a Tax Refund Fast**  
BUSINESS WIRE  
January 12, 2001  
JOURNAL CODE: WBWE    LANGUAGE: English    RECORD TYPE: FULLTEXT  
WORD COUNT:    1152

(USE FORMAT 7 OR 9 FOR FULLTEXT)

...      asks the taxpayer to include their adjusted gross income and some tax information from their **previous year's tax return** . Selecting a PIN number and providing the other personal tax information serves as the taxpayer...

**23/3,K/11      (Item 1 from file: 810)**  
DIALOG(R)File 810:Business Wire  
(c) 1999 Business Wire . All rts. reserv.

0438807    BW0045

**INTUIT TAX SOFTWARE: Record Number Of Americans To File Tax Returns With  
Tax Software; Falling Computer Prices and Improved Tax Software  
Usability Propel Growth**

October 24, 1994

Byline:            Business Editors/Computer Writers

...software  
to use, but the fastest and smartest way for consumers to prepare their own **tax returns** .

"Over the **past** 10 years, consumers have made **TurboTax** the country's No. 1 best-selling tax preparation software because it's been the...  
?



26/3,K/1 (Item 1 from file: 16)  
DIALOG(R)File 16:Gale Group PROMT(R)  
(c) 2005 The Gale Group. All rts. reserv.

06065148 Supplier Number: 53517188 (USE FORMAT 7 FOR FULLTEXT)  
**Small Business Owners Spend 520 Hours Per Year On Taxes; as the U.S. Tax Code Becomes Increasingly Complex, America's Entrepreneurs are Faced With Bigger Challenges.**  
Business Wire, pl140  
Jan 6, 1999  
Language: English Record Type: Fulltext  
Document Type: Newswire; Trade  
Word Count: 672

(USE FORMAT 7 FOR FULLTEXT)  
TEXT:  
...business owners spend 10 hours per week -- or 520 hours per year -- maintaining their business **tax records**, according to a survey conducted by **TurboTax** /MacInTax for Business, the only tax preparation software designed exclusively for small businesses.

26/3,K/2 (Item 2 from file: 16)  
DIALOG(R)File 16:Gale Group PROMT(R)  
(c) 2005 The Gale Group. All rts. reserv.

01499463 Supplier Number: 41819691 (USE FORMAT 7 FOR FULLTEXT)  
**CHIPSOFT**  
Computer Reseller News, pc23  
Jan 28, 1991  
Language: English Record Type: Fulltext  
Document Type: Magazine/Journal; Trade  
Word Count: 123

(USE FORMAT 7 FOR FULLTEXT)  
TEXT:  
**TurboTax** Personal 1040 is income tax software that lets users prepare and print their personal income tax return, forecast and plan for next year's taxes, and keep **tax records** updated year-round. Features: The appropriate form or schedule for a given income or expense...

26/3,K/3 (Item 1 from file: 148)  
DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

10727272 SUPPLIER NUMBER: 53517188 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Small Business Owners Spend 520 Hours Per Year On Taxes; as the U.S. Tax Code Becomes Increasingly Complex, America's Entrepreneurs are Faced With Bigger Challenges.**  
Business Wire, 1140  
Jan 6, 1999  
LANGUAGE: English RECORD TYPE: Fulltext  
WORD COUNT: 709 LINE COUNT: 00060

TEXT:  
...520 hours per year -- maintaining their business tax records, according to a survey conducted by **TurboTax** /MacInTax for Business, the only tax preparation software designed exclusively for small businesses.

**26/3,K/4 (Item 2 from file: 148)**

DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

09961840 SUPPLIER NUMBER: 20132609 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**Award-Winning TurboTax For Business Offers Small Businesses Comprehensive  
Business-Specific Advice To File Their Taxes.**

Business Wire, p1130053

Jan 13, 1998

LANGUAGE: English RECORD TYPE: Fulltext

WORD COUNT: 2060 LINE COUNT: 00182

... a great deal of time maintaining their tax records, averaging four hours each week. (a) **TurboTax** and MacInTax for Business use the award-winning EasyStep(R) Interview process to guide users...

**26/3,K/5 (Item 3 from file: 148)**

DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2005 The Gale Group. All rts. reserv.

07799818 SUPPLIER NUMBER: 16808298 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**New California Sales Tax Software Released By Intuit; First Sales Tax**

**Return Preparation Program for Small Business and Professional Market.**

Business Wire, p4130070

April 13, 1995

LANGUAGE: ENGLISH RECORD TYPE: FULLTEXT

WORD COUNT: 820 LINE COUNT: 00071

... alesTax for California is that the program helps small businesses stay organized, by keeping sales **tax records** together and systematically ordered. It also makes filing more convenient than ever, since taxpayers can...

**26/3,K/6 (Item 1 from file: 160)**

DIALOG(R)File 160:Gale Group PROMT(R)  
(c) 1999 The Gale Group. All rts. reserv.

02124991

**TURBOTAX-WITH TAX PLANNING, NEW FEATURES SHIPPED BY CHIPSOFT, INC.**

News Release December 1, 1988 p. 1

**TurboTax** Personal/1040, the #1 selling income tax preparation program for the IBM PC, XT, AT...

... and compatibles, is now shippin in its 1988 tax year format. ChipSoft, Inc., publisher of **TurboTax**, released the program on November 25 in time for folks to do their year-end tax planning. **TurboTax** Personal/1040 has become popular because it does more than simply do taxes. **TurboTax** is a complete, easy to use system for tax return preparation, tax planning and **tax record** keeping. And the system provides HELP in a number of ways that are unique to...

... the shipping costs to all 50 states. A major reason for the continued popularity of **TurboTax** is that ChipSoft listens to its customers and enhances the program each year. ...

**26/3,K/7 (Item 1 from file: 275)**

DIALOG(R)File 275:Gale Group Computer DB(TM)  
(c) 2005 The Gale Group. All rts. reserv.

01713203 SUPPLIER NUMBER: 15040459 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**The tax man cometh. (12 tax-preparation software packages) (Software Review) (includes summary) (Evaluation)**  
Nelson, Stephen L.  
Home Office Computing, v12, n3, p74(4)  
March, 1994  
DOCUMENT TYPE: Evaluation ISSN: 0899-7373 LANGUAGE: ENGLISH  
RECORD TYPE: FULLTEXT; ABSTRACT  
WORD COUNT: 2273 LINE COUNT: 00172

...ABSTRACT: three platforms (on the Macintosh it is called MacInTax). Tax-preparation packages typically use interview, **tax records** and direct form filling approaches for collecting user tax data. An interview approached was used...

...Windows and Macintosh versions MECA Software's Andrew Tobias' TaxCut, which were rated second behind **TurboTax**; Parsons Technology's Tax Edge in \$19 MS-DOS and Windows versions; and Computer Associates...

**26/3,K/8 (Item 2 from file: 275)**

DIALOG(R)File 275:Gale Group Computer DB(TM)  
(c) 2005 The Gale Group. All rts. reserv.

01579308 SUPPLIER NUMBER: 12913450 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Financial management. (Software Review) (software for Apple Macintosh computers, Evaluation)**  
MacUser, v8, n13, p129(4)  
Annual, 1993  
ISSN: 0884-0997 LANGUAGE: ENGLISH RECORD TYPE: FULLTEXT; ABSTRACT  
WORD COUNT: 3633 LINE COUNT: 00296

... Apr '90)  
Quicken  
Quicken is an excellent tool for home budgets, cash-flow management, and **tax - record** keeping. Mimics your checkbook, so tracking finances is easy and intuitive. Provides detailed, customizable reports...

...Superlative documentation and on-line help. Exports data in SYLK (Excel) or STD (MacInTax and **TurboTax**) formats. Lacks standard accounting safeguards and advanced features required for serious business use. Version 3...

**26/3,K/9 (Item 3 from file: 275)**

DIALOG(R)File 275:Gale Group Computer DB(TM)  
(c) 2005 The Gale Group. All rts. reserv.

01494287 SUPPLIER NUMBER: 11666708 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Software that won't tax your patience. (Meca Software Inc.'s TaxCut, TaxCut EZ/A, TaxCut for Windows, tax preparation software) (Forum, brief article) (Product Announcement)**  
Bruno, Ron Bel  
PC Sources, v3, n1, p82(1)  
Jan, 1992  
DOCUMENT TYPE: Product Announcement ISSN: 1052-6579 LANGUAGE:

ENGLISH            RECORD TYPE: FULLTEXT  
WORD COUNT:    373        LINE COUNT:    00027

... features a useful import function, which accepts files from TaxCut 1040 and TaxCut EZ/A, **Turbo Tax** , Quicken 4.0 and 5.0, and CheckFree, as well as Meca's Managing Your...

...function, a tongue-in-cheek reference to how some taxpayers file important receipts and other **tax records** . If you're not sure where to expense a particular receipt, the shoe box function...

**26/3,K/10        (Item 4 from file: 275)**  
DIALOG(R)File 275:Gale Group Computer DB(TM)  
(c) 2005 The Gale Group. All rts. reserv.

01423840        SUPPLIER NUMBER: 10392349        (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**A guide to tax-preparation software: you can save money and time using these recommended programs. (buyers guide)**  
Hallerman, David  
Home Office Computing, v9, n3, p52(4)  
March, 1991  
DOCUMENT TYPE: buyers guide        ISSN: 0899-7373        LANGUAGE: ENGLISH  
RECORD TYPE: FULLTEXT; ABSTRACT  
WORD COUNT:    2108        LINE COUNT:    00164

... an HP LaserJet II or compatible printer.  
... Import tax data. If you've kept yearlong **tax records** --such as the deductible business expenses you'd list on Schedule C--with either Managing ,  
...

...Money or Quicken, you're in luck. Several of the recommended programs--such as TaxCut, **TurboTax** , and Swiftax--will import data files created with either major personal-finance program. Most programs...

**26/3,K/11        (Item 5 from file: 275)**  
DIALOG(R)File 275:Gale Group Computer DB(TM)  
(c) 2005 The Gale Group. All rts. reserv.

01335986        SUPPLIER NUMBER: 08172450  
**Taking it home: the practical guide to home/office computing; a home office could spell tax savings.**  
Magid, Lawrence J.  
PC World, v8, n3, p282(1)  
March, 1990  
ISSN: 0737-8939        LANGUAGE: ENGLISH        RECORD TYPE: ABSTRACT

...ABSTRACT: office equipment, supplies and space are offered and several software programs useful for purposes of **tax record** keeping are briefly highlighted. All or part of the cost of a microcomputer that is...

...qualify. Deductions for work space are even more strictly regulated by the IRS. ChipSoft's **TurboTax** , Andrew Tobias' TaxCut and Quicken 3 offer efficient ways to record and organize tax information...

**26/3,K/12        (Item 1 from file: 621)**  
DIALOG(R)File 621:Gale Group New Prod. Annou. (R)  
(c) 2005 The Gale Group. All rts. reserv.

01783235 Supplier Number: 53517188 (USE FORMAT 7 FOR FULLTEXT)  
**Small Business Owners Spend 520 Hours Per Year On Taxes; as the U.S. Tax Code Becomes Increasingly Complex, America's Entrepreneurs are Faced With Bigger Challenges.**

Business Wire, pl140

Jan 6, 1999

Language: English Record Type: Fulltext

Document Type: Newswire; Trade

Word Count: 672

(USE FORMAT 7 FOR FULLTEXT)

TEXT:

...business owners spend 10 hours per week -- or 520 hours per year -- maintaining their business **tax records**, according to a survey conducted by **TurboTax** /MacInTax for Business, the only tax preparation software designed exclusively for small businesses.

**26/3,K/13 (Item 1 from file: 20)**

DIALOG(R)File 20:Dialog Global Reporter

(c) 2005 The Dialog Corp. All rts. reserv.

21321287 (USE FORMAT 7 OR 9 FOR FULLTEXT)

**IRS Promotes Electronic Filing of Income Tax Returns**

Loretta Kalb

KRTBN KNIGHT-RIDDER TRIBUNE BUSINESS NEWS (SACRAMENTO BEE - CALIFORNIA)

February 17, 2002

JOURNAL CODE: KSAB LANGUAGE: English RECORD TYPE: FULLTEXT

WORD COUNT: 626

(USE FORMAT 7 OR 9 FOR FULLTEXT)

... as failure to make needed entries.

TurboTax has the advantage of being easily integrated with **tax records** collected throughout the year via Intuit's popular money management product, Quicken.

And TaxCut users...

**26/3,K/14 (Item 2 from file: 20)**

DIALOG(R)File 20:Dialog Global Reporter

(c) 2005 The Dialog Corp. All rts. reserv.

03929492 (USE FORMAT 7 OR 9 FOR FULLTEXT)

**Small Business Owners Spend 520 Hours Per Year On Taxes; as the U.S. Tax Code Becomes Increasingly Complex, America's Entrepreneurs are Faced With Bigger Challenges**

BUSINESS WIRE

January 06, 1999

JOURNAL CODE: WBWE LANGUAGE: English RECORD TYPE: FULLTEXT

WORD COUNT: 855

... 520 hours per year -- maintaining their business tax records, according to a survey conducted by **TurboTax** /MacInTax for Business, the only tax preparation software designed exclusively for small businesses.

Despite this...

**26/3,K/15 (Item 1 from file: 810)**

DIALOG(R)File 810:Business Wire  
(c) 1999 Business Wire . All rts. reserv.

0800262 BW1169

**INTUIT INC: American Taxpayers Invited to Sing the Blues**

January 27, 1998

Byline: Business Editors

...2 Blues" Contest

Whether a dog ate your return or El Nino destroyed all your  
**tax records** , **TurboTax** (R) and the Chicago Blues Club of New York City  
invite taxpayers to put their...

**26/3,K/16 (Item 2 from file: 810)**

DIALOG(R)File 810:Business Wire  
(c) 1999 Business Wire . All rts. reserv.

0794118 BW0053

**INTUIT TURBOTAX: Award-Winning Turbotax For Business Offers Small  
Businesses Comprehensive Business-Specific Advice To File Their Taxes**

January 13, 1998

...needs."

Time is Money

Small business owners spend a great deal of time maintaining  
their **tax records** , averaging four hours each week.(a) **TurboTax** and  
MacInTax for Business use the award-winning EasyStep(R) Interview  
process to guide users...  
?